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ABSTRACT

Developed as part of a project to encourage state-wide collaborative agreements between education and rehabilitation agencies involved in the transition of blind and visually handicapped students (ages 16-25) from school into the work force, the manual is intended to assist state teams of education, rehabilitation, parent, and consumer representatives in their training function. Part I presents needs, goals, and objectives in five sections focused on students, parents, professionals, adult role models, and employers, respectively. Part II presents modules for four training options: (1) individual transition plan through the individual transition team; (2) self-help group development; (3) publication development; (4) seminar/conference/workshop development. Modules typically contain handouts, specific group activities, worksheets, resource lists, examples, and references. (DB)

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COLLABORATIVE PLANNING: TRANSITION FROM SCHOOL TO WORK

TRAINING IDEAS, STRATEGIES AND ACTIVITIES

NATIONAL LEADERSHIP INSTITUTE FOR PERSONNEL IN EDUCATION AND REHABILITATION OF THE BLIND AND VISUALLY HANDICAPPED

Sponsored by
The American Foundation
for the Blind

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TRAINING IDEAS, STRATEGIES AND ACTIVITIES

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TRANSITION FROM SCHOOL TO WORK

TRAINING IDEAS, STRATEGIES AND ACTIVITIES

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TRAINING IDEAS, STRATEGIES AND ACTIVITIES

INTRODUCTION

This training manual was prepared for use by the state transition teams to:

(1) assist in the further identification and refinement of individual state team needs, goals, objectives; (2) provide suggested guidelines, by presenting modules, for individual state team training options in four areas -- (a) individual transition plan through individual transition team, (b) self-help group development, (c) developing a publication, and (d) seminar/conference/workshop development;
(3) enhance planning and training efforts; and
(4) clarify the factors which positively influence the transition of blind and visually impaired youth.

Part I - Transition Needs, Goals, and Objectives

Part I presents needs, goals and objectives addressed in five sections. The focus of each section differs. The first is for students; the second, parents; the third, professionals; the fourth, adult role models; and the fifth, employers.

It is recommended that you, as individuals, and then as a team carefully review Part I and check those Objectives which you believe and/or know warrant further attention in your state. You will find that many of the objectives listed have indeed been addressed and some have been met. After you have studied Part I, have a state team meeting and use the collaborative planning process learned at the AFB Leadership Training Institute, to identify all the objectives your state intends to address. Then, through consensus, prioritize them and select the objectives for your training activity. Do not limit yourself to the objectives identified here. There are many others. Your state may wish to develop objectives which are far more relevant to your students. Go through this process for all five sections in Part I. Keep in mind that trying to do everything may only result in frustration. Prioritize, again and again. Combine objectives for all groups you plan to target for your training activity. As you discuss and determine the training activity which you will implement you may need to reduce the number of objectives. However, you may find your training activity will address more objectives than originally selected. Start by being realistic and reasonable. But, on the other hand, don't forget to dream -- at least a little!

Part II - Training Modules

Part II presents modules for four training options; (a) individual transition plan through individual transition team, (b) self-help group development, (c) developing a publication, and (d) seminar/conference/workshop development. You may have a pre-conceived notion of the type of training activity you want to do, but read them all!

Once again, you may have other training activities in mind--we welcome innovative and creative ideas for training! The four training modules were selected and developed based on review of all states' action plans. We recognize the limitation of presenting only four training modules. If your state team decides to develop a totally different training activity, we hope the modules provided will be of some assistance. They can provide you with ideas, format structures, organizational and development strategies.

Some of the modules are interactive. You may duplicate them and use them as worksheets. After you have read them all, prioritize your needs, goals, and objectives, and discuss among yourselves the most effective training activity. Select the one which when implemented will partially or totally meet your objectives.

We encourage you to continue your state transition team collaborative work as you progress into a training phase. Face the challenge by planning through consensus.

PART I

TRANSITION NEEDS, GOALS, AND OBJECTIVES

I. TRANSITION NEEDS, GOALS, AND OBJECTIVES: STUDENTS

1.0 Need: Blind and visually impaired students need to develop psycho-social and work-related skills which will enable them to undertake part or full time employment.

2.0 Goal: To enable students to develop work-related skills.

3.0 Objectives: Blind and visually impaired transition-age students will:

3.1 Recognize the impact of school experience and community experience on future vocational plans/achievement

3.2 Understand job clusters/job families

3.3 Understand that careers have a specific pattern of preparation, both formal (academic) and informal (experiential)

3.4 Recognize that adult role models (parents, teachers, siblings) have an impact on one's career choices

3.5 Develop ability after gaining information to identify various tasks that are a part of a job (job analysis)

3.6 Understand the concept of job accommodation and identify some personal accommodation needs (e.g. applicable technological devices, correct lighting, etc.)

3.7 Match personal interests and abilities with possible career choices

3.8 Increase knowledge base of occupations and careers through reading, observations, and gathering information

3.9 Identify job seeking skills

3.10 Internalize personal information for use in job seeking (e.g., basic job application and interview information)

3.11 Recognize interdependence of people in the work environment

3.12 Develop a personal strategy for involving relevant resource persons in one's career planning process (e.g., school counselor, parents, career development team, etc.)

3.13 Seek opportunities for work responsibility in the home, school, and neighborhood

3.14 Develop an understanding of the value of work to self and to society (not just monetary but personal and societal)

3.15 Identify occupational opportunities that are available in the local communities (including resources for the information)

3.16 Identify and exhibit positive work habits that generalize to all work settings (e.g., behavioral aspects, performance aspects, safety aspects, interdependent aspects)

3.17 Determine training needs (academic/vocational/on-the-job) and experiences to achieve chosen career goals

3.18 Increase understanding and knowledge of occupations and varied work settings through involvement in actual after school/summer work experiences

3.19 Refine knowledge of job clusters/job families

3.20 Develop independent living and personal management skills that are generalized to a variety of occupations and settings

3.21 Refine ability to task analyze a variety of jobs

3.22 Identify personal job accommodation needs and actively seek funds, etc., to secure any assistive/adaptive technology that facilitates employment

3.23 Refine job seeking skills in:

  3.23.1 Resume development
  3.23.2 Employment resources identification
  3.23.3 Interviewing skills development

3.24 Develop acceptable work habits with special emphasis on responding to supervision and adapting to change

3.25 Identify "promotability" skills

3.26 Acquire and utilize labor market information from varied resources on a continuing basis

3.27 Develop the concept of work being a valuable personal experience and social contribution (Simpson, 1986, pp. 412-415.)

II. TRANSITION NEEDS, GOALS, AND OBJECTIVES: PARENTS

1.0 Need: Parents need to be an integral part of a collaborative process which will facilitate the transition from school to work for their blind/visually impaired children.

2.0 Goal: To utilize education, rehabilitation and community resources on behalf of their child as he/she is ready to accomplish critical steps in the transition process.

3.0 Objectives: The parents will:

3.1 Be an active and full participant in their child's individualized transition team

3.2 Understand their child's legal rights

3.3 Assist their child in developing realistic career expectations

3.4 Be aware of a full range of career options available to their child

3.5 Be familiar with the continuum of employment models which may be appropriate for their child

3.6 Be aware of career and vocational education opportunities in local/regional areas

3.7 Support their child's education, rehabilitation, career/vocational training and placements by reinforcing social, independent living, and job related skill development

3.8 Understand the differences between education -- an entitlement system, and rehabilitation -- an eligibility system

3.9 Recognize that utilization of the education system and the rehabilitation system requires different strategies

3.10 Learn the roles, responsibilities, and expected benefits of all service providers involved with their child's education, rehabilitation, and transition processes

3.11 Access local service agencies for which their blind/visually impaired child is eligible

3.12 Know employer requirements such as:

    3.12.1 social skills
    3.12.2 resume presentation
    3.12.3 interview skills
    3.12.4 work experience
    3.12.5 job skills
    3.12.6 work habits
    3.12.7 cooperation with employees
    3.12.8 cooperation with supervisors

3.13 Understand employment barriers such as:

    3.13.1 prejudice
    3.13.2 discrimination
    3.13.3 inaccessibility
    3.13.4 lack of accommodation
    3.13.5 transportation
    3.13.6 housing
    3.13.7 insurance requirements

3.14 Assist their blind/visually impaired child in developing strategies to overcome employment barriers

3.15 Access local service agencies and/or self-help groups for their individualized parenting needs, i.e., respite care providers, and parent organizations.

III. TRANSITION NEEDS, GOALS, AND OBJECTIVES: PROFESSIONALS

1.0 Need: Professionals need to learn to work collaboratively to facilitate the transition of blind/visually impaired youth from school to work.

2.0 Goal: To understand education and rehabilitation systems as they relate to the needs of blind/visually impaired youth in transition.

3.0 Objectives: The professional will:

3.1 Serve as an advocate for students/clients

3.2 Know the legal rights of students/clients

3.3 Be aware of a full range of career options

3.4 Be able to assess student skills

3.5 Be able to assist students/clients in developing realistic expectations

3.6 Be able to develop individualized transition plans

3.7 Clarify his/her role in the career development process

3.8 Include the career development process in instructional programs

3.9 Be aware of career and vocational education opportunities in local/regional areas

3.10 Be able to operationalize individualized transition plans

3.11 Know general employer requirements and expectations in such areas as:

3.11.1 social skills
3.11.2 resume presentation
3.11.3 interview skills
3.11.4 work experience
3.11.5 job skills
3.11.6 work habits
3.11.7 cooperation with co-workers
3.11.8 cooperation with supervisors

3.12 Apply strategies to overcome employment barriers such as:

  - 3.12.1 prejudice
  - 3.12.2 discrimination
  - 3.12.3 inaccessibility
  - 3.12.4 lack of accommodation
  - 3.12.5 transportation
  - 3.12.6 housing
  - 3.12.7 insurance requirements

3.13 Know the components of various employment models

3.14 Understand job analysis strategies

3.15 Conduct job analyses

3.16 Develop cooperative working relationships with employers

3.17 Utilize local/regional, statewide employment trends

3.18 Access part-time employment opportunities

3.19 Access work experience programs for students

3.20 Develop cooperative working relationships with community support services

3.21 Use local services, both generic and specialized

3.22 Understand the roles and responsibilities of related service providers,agencies, schools, and organizations

3.23 Be able to refer students and families to appropriate services

3.24 Provide consultation to school, rehabilitation agencies, and employment specialists

3.25 Be familiar with existing family support group networks

3.26 Assist families in organizing support groups

3.27 Be familiar with and enlist the services of local/regional adult visually handicapped role models

IV. TRAINING NEEDS, GOALS, AND OBJECTIVES: ADULT ROLE MODELS

1.0 Need: Blind and visually impaired students need adult role models who will help them make realistic decisions, stimulate them to achieve and allay some of their anxieties about the transition from school to adulthood.

2.0 Goal: Adults who are blind or visually impaired will participate in the collaborative process to improve transition from school to work for blind and visually impaired youth.

3.0 Objectives: The adult role model will:

3.1 Recognize the value of sharing skills/knowledge/attitudes/perspectives based on personal experience, with students, parents, and professionals

3.2 Prepare an inventory of personal strategies (human ingenuity) that facilitated personal transition from school to work

3.3 Provide feedback to professionals on relevance of educational and rehabilitation experiences

3.4 Provide feedback/information to potential employers on the unique job accommodation needs of the blind or visually imparied worker

3.5 Provide feedback/information to potential employers on the similarity of traits and needs of handicapped and non-handicapped workers

3.6 Identify local and state "gaps" in the continuum of education/rehabilitation/community services which hinder successful school-to-work transition

3.7 Recommend strategies to close the "gaps" in the continuum of services

3.8 Use status as a successfully employed adult to provide students with a better understanding of the relationships between school and work

3.9 Reinforce with students the need to be aware of and meet the expectations of employers

3.10 Reinforce with students the need for appropriate social/personal skills

3.11 Provide feedback to students, professionals and parents on attitudinal barriers (internal and external) and describe resources needed to eliminate or deal with these barriers

3.12 Provide feedback to students, parents, and professionals on the value of consumers' groups for support, advocacy and change

3.13 Advocate for the improvement of collaborative action for the enhancement of transition services

V. TRAINING NEEDS, GOALS, AND OBJECTIVES: EMPLOYERS

1.0 Need: Blind and visually impaired students need to have employers participate in the collaborative planning process to facilitate the transition from school to work.

2.0 Goals: Recognize the employment needs and potential of blind and/or visually impaired students. Accept workers who are blind and/or visually impaired.

3.0 Objectives: The employer will:

3.1 Provide specific information to students, professionals, and parents on employers' expectations

3.2 Provide specific information on trends in the local labor market and specific manpower needs

3.3 Provide feedback (consultation) on the relevance of current educational programs, experiences, and training of blind and/or visually impaired students to future employment options

3.4 Share successful work experiences involving blind or visually impaired employees with other potential employers

3.5 Conduct on-going job analyses in employment settings to determine suitability of varied opportunities/options for blind and visually impaired applicants

3.6 Participate in development of job accommodation strategies using not only technology but human ingenuity (job restructuring, job sharing, job coach model, etc.)

3.7 Develop with professionals a series of career awareness experiences to include field trips, job shadowing, and on-the-job training

3.8 Develop with support of professionals a series of meaningful work experiences that give students the chance for "hands on" opportunities

3.9 Develop a recruitment policy which encourages application by qualified blind/visually impaired persons

3.10 Modify in-house industry/business training activities to assure that blind/visually impaired employees have equal access to these opportunities

3.11 Support co-workers of blind/visually impaired workers through awareness/training activities

3.12 Develop a systematic method for informing education and rehabilitation professionals of job openings

3.13 Use resources of local/state Committees for Employment of the Handicapped

3.14 Advocate for collaborative action to improve transition services

REFERENCES

Rights of passage. (1985) Final report of the Task Force on the transition from school to work for Montgomery County students with disabilities. Montgomery County Public Schools, Rockville, Maryland.

Simpson, F. (1986) "Transition to Adulthood". In, Scholl, G.T. (Ed) Foundations of education for blind and visually handicapped children and youth: Theory and practice. New York: American Foundation for the Blind. pp. 412-415.

TRANSITION FROM SCHOOL TO WORK

TRAINING IDEAS, ACTIVITIES AND STRATEGIES

PART II

TRAINING MODULES

TRAINING MODULE I

THE INDIVIDUAL TRANSITION PLAN
THROUGH
THE INDIVIDUAL TRANSITION TEAM

Introduction

The terms IEP (Individualized Education Program) and IWRP (Individualized Written Rehabilitation Program) are commonly recognized terms and concepts. In the educational setting the IEP is meant to be written and agreed upon by a committee comprised of the student's teacher, the person responsible for supervising the student's special education program, the student's parent, the student, and the person responsible for, or knowledgeable of, the students' evaluations and related interpretations. In the rehabilitation setting the rehabilitation counselor and the client are to share in the development and management of the IWRP which ultimately serves as a contract.

The IEP is required to contain minimal information such as current levels of performance, annual goals, short-term objectives, special education and related services, extent of participation in regular classroom activities, projected dates for initiation and anticipated duration of specialized services, evaluation procedures criteria, and schedules for measuring objectives on at least an annual basis. Section 102 of the Rehabilitation Act of 1973 requires the Individualized Written Rehabilitation Program (IWRP). The IWRP governs the nature of eligibility to services and is both a process and product. It places legal parameters on services to be provided as well as the manner of service provision. In the IWRP process both the rehabilitation counselor and the client have input which results in a mutually agreed upon plan.

Individualized Transition Process

Borrowing from the concepts involved in IEP and IWRP development and implementation, the staff from Virginia Commonwealth University, Rehabilitation Research and Training Center, Project TIE (Transition Into Employment) developed an individualized transition process. They have encouraged us to share this model with the State Transition Teams by incorporating their concept into this Module, The Individual Transition Plan through The Individual Transition Team.

The procedure is presented, in sequential order, for transition planning to be used by an Individual Transition Team (ITT). This procedure includes:

1. identification and development of an Individual Transition Team (ITT) and an Individual Transition Plan (ITP);
2. outcome-oriented cooperation and collaboration with adult service agencies, parents, students, adult role models, and employers; and

3. a formal, systematic approach to job placement and community functioning outcomes from secondary school programs.

The State Transition Team can serve as the catalyst for the identification, development, and activation of Individual Transition Teams which can, in turn, develop and activate Individual Transition Plans for blind or visually impaired students. A core transition team can plan on behalf of both individuals and small groups.

Individual Transition Team

Garner and Inge (1985) provide four basic guidelines for a "Total Team Model" which can readily be applied to the Individual Transition Team. These are:

1. "The staff should be organized into transition teams serving discrete groups of clients. Each team should include all staff who provide direct services to that particular group on a regular basis" (p. 74).
2. "The total number of adults who serve each transition team should be kept to a minimum" (p. 74).
3. "The transition teams should be the organizational units with the responsibility and authority to plan and implement the program" (p. 75).
4. "The transition teams should be the basic administrative units for both the management of personnel and the program budget, if one is provided" (p. 75).

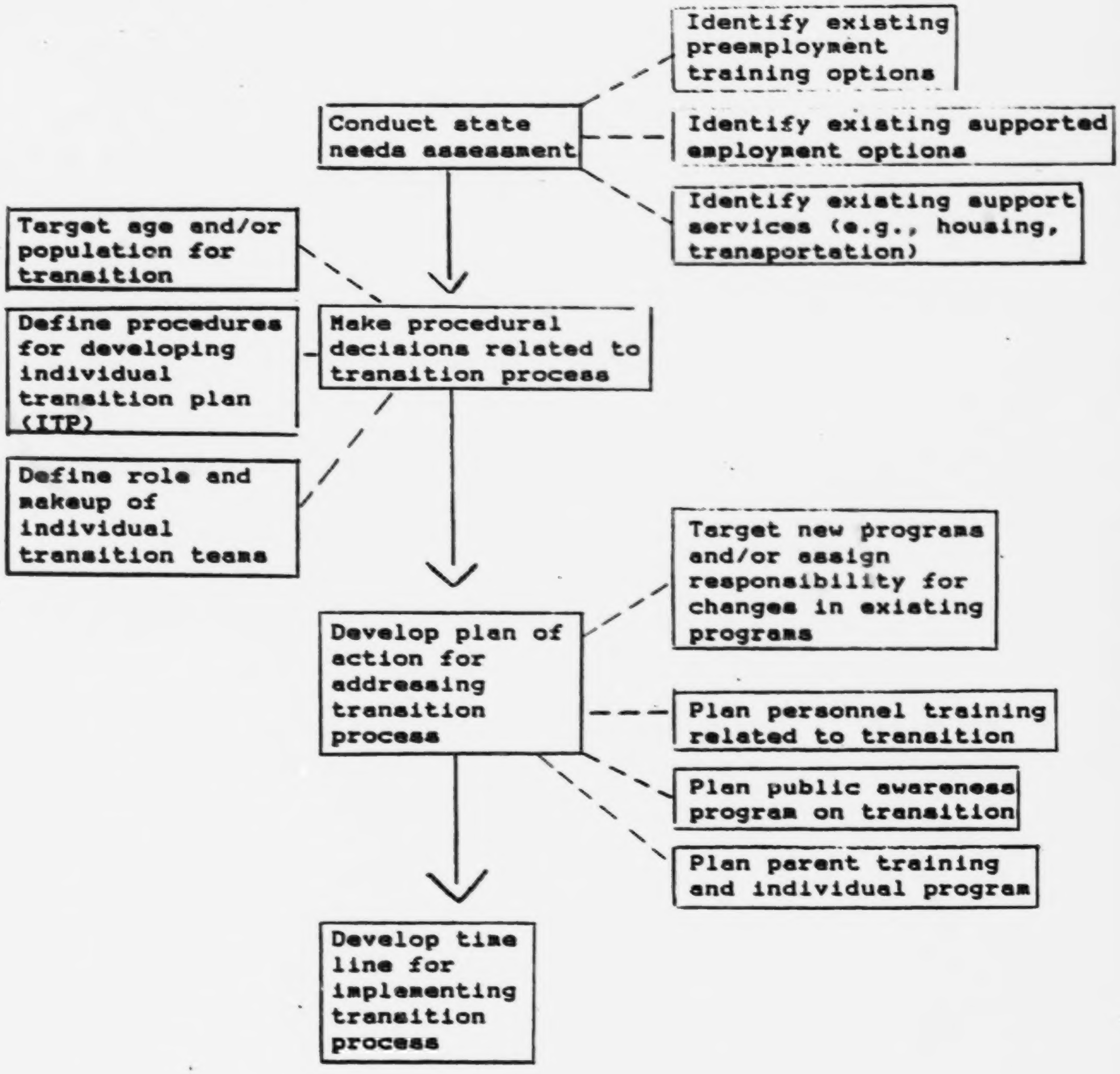
Garner and Inge (1985) further suggest functions and responsibilities for a total team model.

1. "To meet at least once a week and to keep accurate minutes of the team's discussions and decisions. To share these minutes with the team's administrators.
2. To assess the needs of the individuals served by the team. To prioritize these needs for the purposes of planning the team's programs.
3. To develop written plans which specify the needs, the long-term goals, short-term objectives, and the strategies to be employed.
4. To coordinate the implementation of the team's strategies, interventions, and activities--including their timing and their sequence.
5. To schedule the work of all team members including time-off and the arrangement of alternative supervision and services for the clients.
6. To allocate the team's program budget.
7. To solve specific problems faced by the clients and the team through the use of group problem solving and decision making.
8. To evaluate the effectiveness of the team's program and services and to modify them according to need.
9. To provide support, encouragement, and guidance to the team's members.

10. To provide regular feedback to team members regarding the effects of their behavior on the clients and on team members.
11. To participate in the periodic formal evaluation of each team member's performance.
12. To participate in the evaluation and selection of new team members.
13. To generate and discuss new ideas for improving the total program of the school or agency.
14. To serve as a consultant to the program administrator in evaluation proposals for change" (pp. 77-78).

The following chart, developed by Project TIE and presented with slight modification delineates the role of a core transition team.

Core Transition Teams


Identify existing preemployment training options
Conduct state needs assessment
Identify existing supported employment options
Identify existing support services (e.g., housing, transportation)
Target age and/or population for transition
Define procedures for developing individual transition plan (ITP)
Make procedural decisions related to transition process
Define role and makeup of individual transition teams
Target new programs and/or assign responsibility for changes in existing programs
Develop plan of action for addressing transition process
Plan personnel training related to transition
Plan public awareness program on transition
Plan parent training and individual program
Develop time line for implementing transition process

(Project TIE, 1986)

The Individual Transition Team and Plan

The State Transition Team has as its focal point all blind/visually impaired youth in transition in their respective state. At a specified age an ITT is organized for a particular student, or possibly a group of students, (i.e., several students attending the same school or attending school in the same or neighboring school districts) to begin transition planning. The ITT is responsible for: (1) writing, (2) discussing, (3) implementing, and (4) monitoring transitional services in the Individual Transition Plan (ITP) as part of the IEP or IWRP.

As with the State Transition Teams, it is recommended that the ITT include an educator, rehabilitation counselor, parent, and adult role model. In addition, whenever possible include the student(s) and a representative of the employment community (i.e., an employer who has actively participated in work study programs in the community).

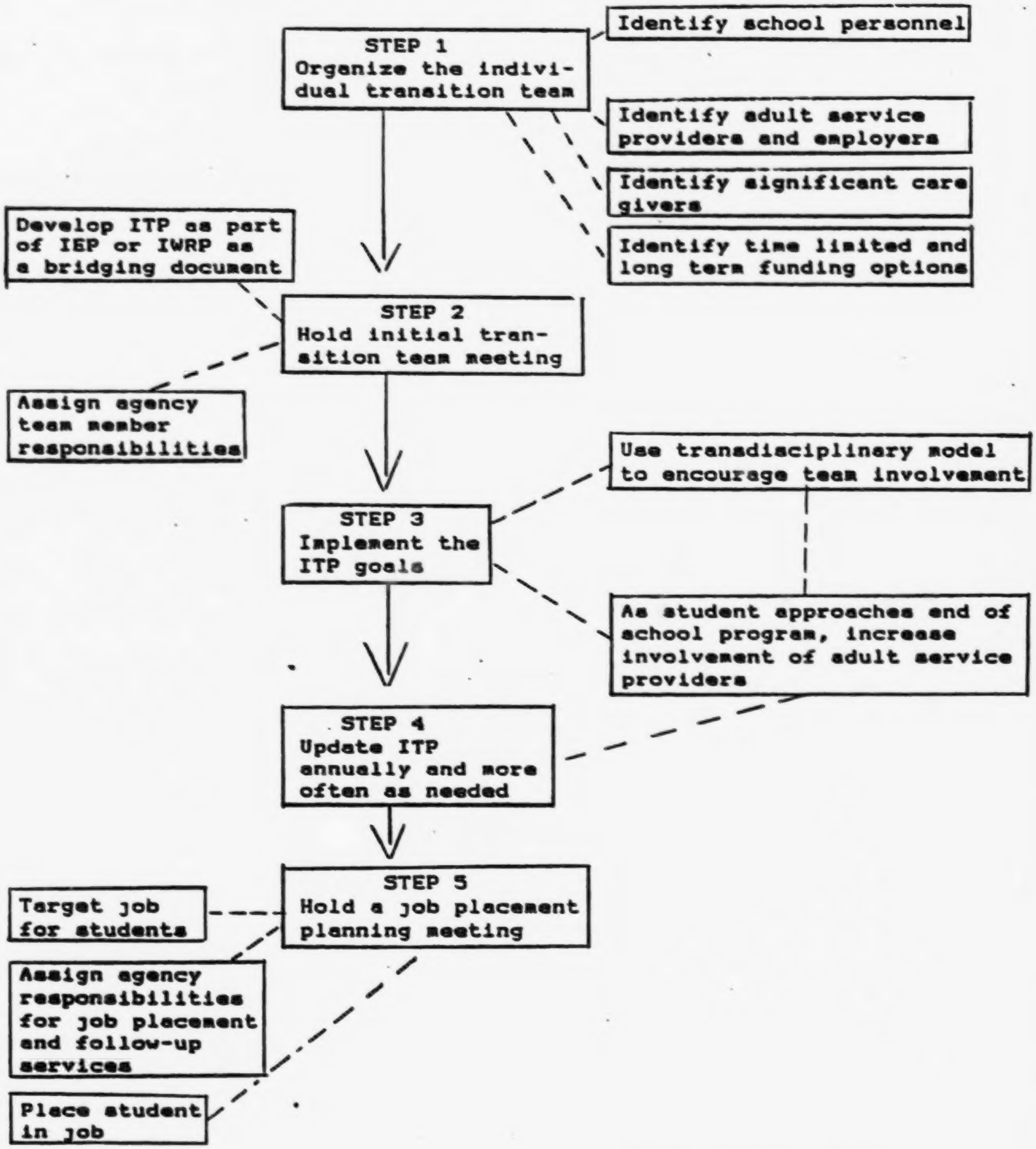
Transition goals identified in ITP's should include:

1. longitudinal work preparation training;
2. job placement;
3. post school follow-along services;
4. job related goals such as transportation, money, and budgeting, leisure skills, social skills, and independent community living; and

5. identification of time-limited and long-term funding options to meet each goal delineated in 1-4 above.

The following chart details the activities of an ITT.

ACTIVITIES OF AN INDIVIDUAL TRANSITION TEAM


STEP 1
Organize the individual transition team
Identify school personnel
Identify adult service providers and employers
Identify significant care givers
Identify time limited and long term funding options
Develop ITP as part of IEP or IWRP as a bridging document
STEP 2
Hold initial transition team meeting
Assign agency team member responsibilities
Use transdisciplinary model to encourage team involvement
STEP 3
Implement the ITP goals
As student approaches end of school program, increase involvement of adult service providers
STEP 4
Update ITP annually and more often as needed
STEP 5
Hold a job placement planning meeting
Target job for students
Assign agency responsibilities for job placement and follow-up services
Place student in job

(Project-TIE, 1986)

In the center blocks of the chart "Activities of An Individual Transition Team" there are five major steps:

1. Organize the individual transition team.
2. Hold the initial transition team meeting.
3. Implement the ITP goals.
4. Update the ITP annually or as often as needed.
5. Hold a job placement planning meeting.

Step 1 - Organize the ITT

It is often the vision teacher who organizes an individual transition team (ITT) for each student (or group of students) identified for transition services. It may however be a parent, student, rehabilitation counselor, etc., who initiates the idea and/or action. An ITT should be comprised of many of the members of a student's IEP team. It should also include representation from rehabilitation services and other relevant adult service agencies who have been targeted for service provision once the student leaves the school system. An ITT should include the student, teacher of the visually impaired, orientation and mobility instructor, vocational education teacher, the vocational rehabilitation counselor, rehabilitation teacher, parents or primary care givers, an employer, an adult role model, and in some cases, an occupational and/or physical and/or speech therapist, and/or a representative from a community living service agency. An individual should be designated as the team leader or case manager.

Step 2 - Initial Meeting

Once the student is selected for transition services, the subsequent IEP meeting should be coordinated with the ITT and develop the student's individual transition plan (ITP) as an integral part of the IEP.

The ITP should target transition outcomes relative to the student's personal, social, community and vocational adjustment needs and goals. The ITP should address not only employment needs and outcomes but also future residential options such as remaining at home with the family, group home placement, semi-supervised or independent living.

Team members must also target functional skills needed to achieve these outcomes, for example, using public transportation, money management skills, participating in food preparation, caring for adaptive equipment, housekeeping skills, and interacting appropriately with employers and co-workers.

Team members should also identify the specific individuals and agencies responsible for implementing specific ITP goals.

Step 3 - Implement ITP Goals

Once an ITP is developed and agreed upon by the members of the ITT, the next step is to begin a coordinated plan of action to implement the transition goals. For example, if a community-based vocational training program at a fast-food establishment is selected for a student, team members may assume the following responsibilities: the vocational educator contacts the employer to do an initial job analysis and determine appropriateness of the training site for specific students; the vision teacher functioning as a job coach trains the student at the job site; the orientation and mobility instructor orients the student to, from, and within the training site; the parents arrange transportation to and from the training site; the vocational rehabilitation counselor conducts follow-up visits to provide support to the student and to the employer; and the adult role model serves as a resource to the blind/visually impaired student and the employer to respond to questions and situations that warrant a response from an experienced worker who has the same impairment.

Step 4 - Updates of ITP

Update the ITP annually or as often as needed. The ITT should meet at least annually if not semi-annually or quarterly to update and evaluate the transition plan. The student's progress should be monitored and the goals updated by the ITT to remain relevant to the student's needs.

Any team member aware of any significant occurrences which may alter a student's ITP should notify the other ITT members, the need for a meeting should be mutually agreeable and a date set.

A student who is initially targeted for a mobile work crew may later be found to be more appropriate for and more interested in supported employment as a dishwasher. A student who was targeted for inclusion in a small engine repair vocational training program may be found to be particularly interested and talented in computer programming. Parents who were initially disinterested in residential support may be interested in learning more about residential options two years later. Availability of transportation and housing options may also change significantly over a period of time. Funding patterns and priorities shift on local, state and national levels. It is critical to continually re-evaluate all components of preparation for transition.

Step 5 - Job Placement Meeting

Hold a job placement meeting during the last year of the student's secondary program. If a student has been targeted for transition services by age sixteen, and if the ITT has been meeting regularly to develop and implement transition goals, the student should be ready for the final planning meeting by the last year of the secondary program. At this meeting, the ITT should make plans and assign responsibilities for implementing the outcomes of the transition process--meaningful employment, residential living, social/recreational activities, and transportation options for the student.

Procedures should be included to maintain systematic communication between the school and adult service agencies before the student leaves school. Previously overlooked school records, evaluations, assessments, aptitude and interest information are important to share with adult service providers. On-going review of the ITP, considering background and current information, results in making more informed decisions relative to transition planning. Collaborative agreements among education and rehabilitation service organizations should include a system of sharing of all relevant information, while still conforming to the laws and ethics of student/client confidentiality.

Once again, borrowing yet modifying the TIE Project from The Rehabilitation Research and Training Center at Virginia Commonwealth University the following chart is presented as a broad outline which the ITT can utilize in the development of goals, activities, team members' responsibilities, and timelines relevant to an ITP. This chart is by no means inclusive but is provided as a beginning point which the team can use and expand upon. This chart can also provide a structure for the development of ITPs to facilitate planning and action.

ESTABLISHING AN INDIVIDUAL TRANSITION PLAN (ITP)

Goals	Activities	Responsible Persons	Timeline
To establish an individual transition team (ITT)	1.Discuss transition planning with student and parents 2.Contact Rehabilitation Services for the Blind to identify counselor 3.Contact Developmental Disabilities (DD) to identify a case manager (if appropriate) 4.Identify ancillary staff (speech pathologist, occupational therapist, etc.) for team participation 5.Contact student's parents 6.Contact all other team members	Student's vision teacher in collaboration with student and family	Early September of student's sophomore high school year NOTE: Planning should start earlier if possible, especially if student will need on-going support/supervision in future adult vocational and residential environments.

Goals	Activities	Responsible Persons	Timeline
To write an Individual Transition Plan (ITP) identifying long-and short-term transition objectives	1.Conduct a transition team meeting as part of the IEP process 2.Identify possible short-term and long-term employment and residential objectives and transportation options 3.Prepare student for job interviews 4.Assign responsibilities for implementation	Individual transition team members: .Vision teacher .Vocational education teacher .DD case manager .Rehabilitation counselor .Parents .Student .Adult Role model .Representative of Employment Community	Early October of student's sophomore high school year

Goals	Activities	Responsible Persons	Timeline
To identify goals and procedures to assure student is provided with community-based vocational training	1.Identify job training sites for student: a)food services b)janitorial c)x-ray technician assistant d)small engine repair e)information specialist f)etc. 2.Utilize the appropriate model for training; based on student needs 3.Train at job site during year and summer as appropriate; Amount of time to be determined based on each student's needs and goals. 4.Monitor and evaluate each position 5.Conduct mock interviews	.Vision teacher .Vocational education teacher .Rehabilitation counselor .DD case manager .Occupational and physical therapist .Student .Adult role model .Representative of employment community	Completed by September 30 of student's junior year in high school.

Goals	Activities	Responsible Persons	Timeline
To identify a job for student to begin her/his last year of school	1. Survey job market based on student's job training 2. Establish employer interviews 3. Identify additional skills that require training, i.e., orientation and mobility, transportation, communication, technological skills, social skills 4. Conduct job placement and training following the appropriate employment model	.Vision teacher .Vocational education teacher .Rehabilitation counselor .DD case manager .Student .Parents .Actual employer .Adult role model .Representative of employment community .School guidance counselor .School social worker .Orientation and mobility specialist	Completed by September 1 of of student's senior high school year

Goals	Activities	Responsible Persons	Timeline
To identify potential long term residential options available in local community	1. Discuss future housing/residential preference with student and parents 2. Review student's current level of independent living skills relative to stated student/family preferences 3. Identify housing/ residence options available in the community where employment is being sought 4. Identify funding available to support long term housing (i.e., student's anticipated earnings, family support, Section 8 housing subsidies, SSI, Developmental Disabilities Funds, etc.) 5. Provide short term training through experience in a range of housing	.Rehabilitation teacher .Student .Family .Rehabilitation counselor .Vision teacher .DD case manager .School social worker .Adult role models .Rehabilitation center staff .Residential service provider	Completed by time of student's school leaving

Goals	Activities	Responsible Persons	Timeline
	options from semi-independent to independent, using local resources (i.e., rehabilitation centers, independent living centers, residential schools, home, etc.)		

Goals	Activities	Responsible Persons	Timeline
To provide employment services as needed after school leaving	1. Determine a plan for a shift of responsibilities from the school system to adult service agencies 2. Determine responsibilities for job placement and follow-along services 3. Develop a plan for communication among team members and cooperating agencies throughout the transition years	.Rehabilitation counselor .DD case manager .Parents .Actual employer .Vision teacher .Vocational education teacher .Adult role model .Representative of employment community .Orientation and mobility specialist	Plan completed by June of student's school leaving

Goals	Activities	Responsible Persons	Timeline
To provide assistance in securing most appropriate residential living environment after school leaving	1.Determine specific-type and location of most appropriate housing/residential option 2.Support student and family in shift to adult housing option 3.Determine transportation needs from "new" home to employment site. Train for skill acquisition to mastery level 4.Establish a definitive financial plan/arrangement for payment of housing costs. 5.Provide on-going advocacy and support relative to continued appropriateness of residential environment	.Student .Family .Rehabilitation teacher .Rehabilitation counselor .Orientation and mobility specialist .Adult role model .DD case manager .Representatives of residential service provider .Vision teacher .School social worker	Plan completed by June of student's school leaving

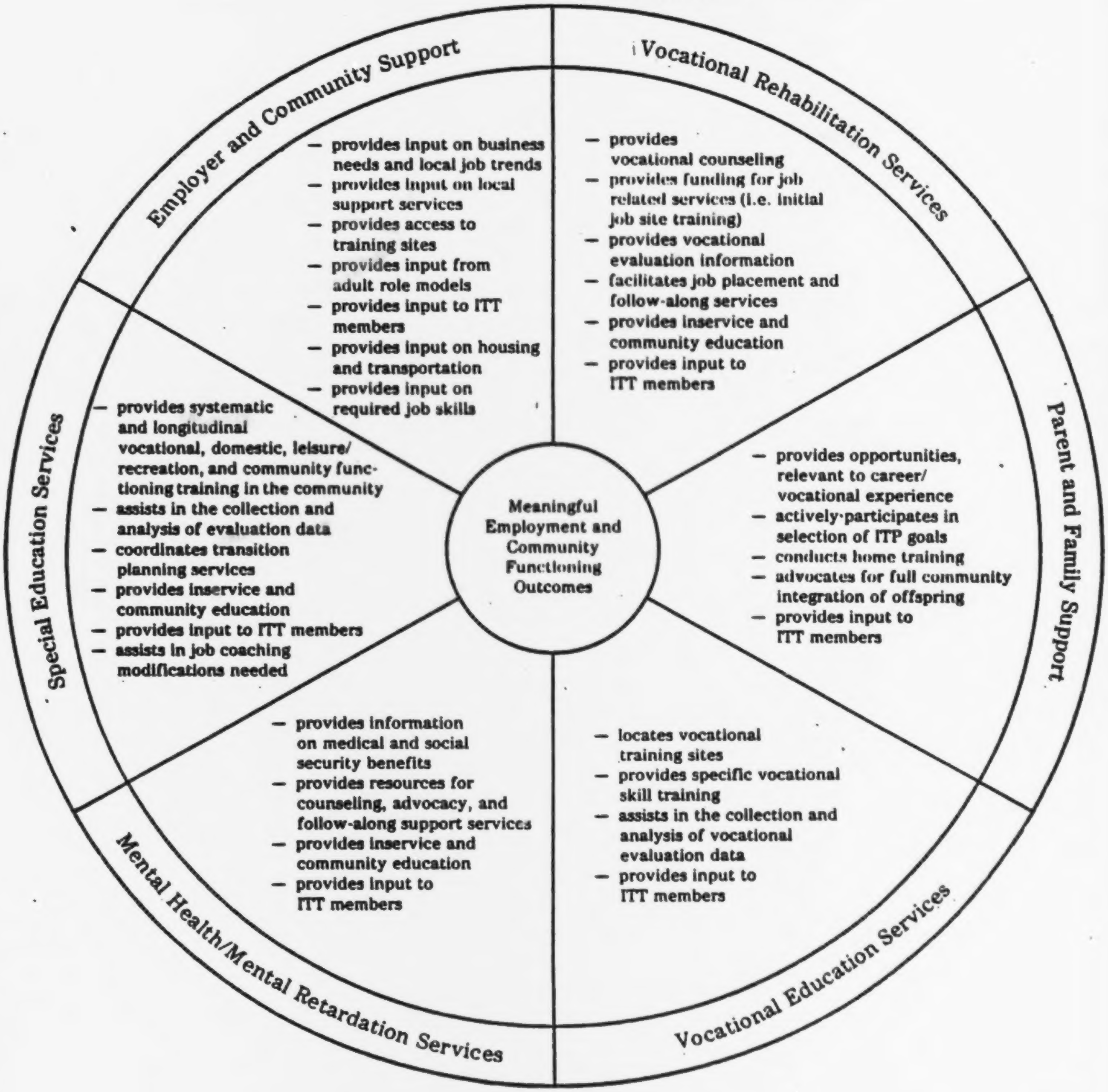
(Project-TIE, 1986; with modifications and additions by AFB Transition Project Staff)

The graphic representation of roles and responsibilities for Transition Service Delivery was developed by Project TIE (1986) with input from representatives from state agencies, parents, and the community. It has been modified by the authors of this manual for use by the American Foundation for the Blind State Transition Teams and consequent Individual Transition Teams which may be developed.

Defining Roles and Responsibilities for Transition Service Delivery

The goal of transition is meaningful, paid employment and successful community functioning for young adults with disabilities. The goal requires a restructuring and rethinking of agency roles and responsibilities at the federal, state, and local levels to ensure appropriate non-duplicated service delivery.

During Project TIE's summer 1985 training course, representatives from state agencies, parents, and the community suggested the following roles and responsibilities for their respective groups. This model has been modified by AFB for use by AFB State Transition Teams and consequent Individual Transition Teams.



Employer and Community Support

- provides input on business needs and local job trends
- provides input on local support services
- provides access to training sites
- provides input from adult role models
- provides input to ITT members
- provides input on housing and transportation
- provides input on required job skills

Vocational Rehabilitation Services

- provides vocational counseling
- provides funding for job related services (i.e. initial job site training)
- provides vocational evaluation information
- facilitates job placement and follow-along services
- provides inservice and community education
- provides input to ITT members

Parent and Family Support

- provides opportunities, relevant to career/vocational experience
- actively participates in selection of ITP goals
- conducts home training
- advocates for full community integration of offspring
- provides input to ITT members

Vocational Education Services

- locates vocational training sites
- provides specific vocational skill training
- assists in the collection and analysis of vocational evaluation data
- provides input to ITT members

Mental Health/Mental Retardation Services

- provides information on medical and social security benefits
- provides resources for counseling, advocacy, and follow-along support services
- provides inservice and community education
- provides input to ITT members

Special Education Services

- provides systematic and longitudinal vocational, domestic, leisure/recreation, and community functioning training in the community
- assists in the collection and analysis of evaluation data
- coordinates transition planning services
- provides inservice and community education
- provides input to ITT members
- assists in job coaching modifications needed

Meaningful Employment and Community Functioning Outcomes

An example of part of an Individual Transition Plan which relates only to employment goals follows:

INDIVIDUAL TRANSITION PLAN

Name: Susan Age: 19

LONG RANGE EMPLOYMENT GOAL

To become employed full-time in a competitive community based setting by age 20.

SHORT TERM OBJECTIVES

1. To participate in on-the-job training experiences in community work settings. Time: Senior high school year. Persons responsible: Special Education Teacher and Vocational Education Teacher.

   Activities

   a) Student will participate during the senior high school year, in food service training in a community-based training site for a minimum of 2 hours/day, 4 days/week.
   b) Student will use public transportation to go to and from job training site.

   Method

   The job coach model will be utilized for training at the job site and also for the purpose of transportation training.

   Funding: Depends on local funding patterns, for example, this training experience could be an integral part of an existing vocational/occupational education program.

Evaluation: Student participates in designated work experience and written evaluation of performance and personal preferences is provided.

2. To complete formal referral process for vocational rehabilitation services. Timeline: May of Junior high school year. Persons responsible: Student, parents, vision teacher, school administrator, etc.

   Activities

   a) A financial eligibility application will be completed to determine eligibility for VR services.
   b) A referral will be made for a vocational evaluation.
   c) An IWRP will be written in conjunction with the transitional IEP Meeting.

   Funding: NA

   Evaluation: Referral completed, eligibility determined, and case status designated.

3. To complete social services referral process for relevant adult services, i.e., SSI, Medicaid, MH/MR community services, social services, etc. Timeline: Fall, Senior high school year. Persons responsible: Parents, student, school guidance counselor, vision teacher, and rehabilitation counselor.

Method

a) A referral will be made for SSI and medicaid benefits.

b) A referral will be made for MH/MR case management services.

Funding: NA

Evaluation: Referrals completed and eligibility determined in each area of service need.

4. To obtain a job in a food service occupation in a busing or dish machine operator position. Position should be competitive. Timeline: Summer/Fall, following completion of secondary school. Persons responsible: Student, Vocational Education Teacher, Rehabilitation Counselor, and/or Vision Teacher.

Activities

a) Applications will be made to advertised positions for food service occupations.

b) Jobs analysis completed on possible competitive positions.

c) Review of student's preferences and skills relative to job requirements.

d) Interviews will be scheduled for student for advertised food service positions that match with preference and skills.

e) Employment secured.

f) Support by ITT to employer and co-workers as needed.

g) Student will be trained to use public transportation to go to and from employment site.

h) Systematic support/follow-along plan as needed.

Method

A supported work approach will be utilized for job placement, job training and transportation training.

Funding: Depends on local funding patterns and student eligibility.

Evaluation: Employment secured and follow-along plan in place.

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TRAINING MODULE II

SELF-HELP GROUP DEVELOPMENT

INTRODUCTION

This module is presented to give you information and ideas that contribute to 1) an increased understanding of group process and development, and 2) a prototype model for use in developing self-help groups. Section I is interactive in that you are asked to share your own personal experiences as a group member and reflect not only on your feelings about group membership, but also your understanding of group process. An emphasis is placed on developing a heightened awareness of the relationship of group climate to group success and outcomes, and how to consider supporting and meeting individuals' needs while maintaining group cohesion.

Section II on self-help group development is based on Helping You Helps Me, by Karen Hill (1984). Parts of this guidebook are followed by suggested activities to use in self-help group development. These are also presented in an interactive format to be used at your discretion, should you choose to follow this prototype. This model is currently used by many Self-Help Clearinghouse programs.

SELF-HELP GROUPS

Why might your state team decide that a group which encourages mutual aid and self-enhancement would assist blind and visually impaired youth in transition? Are such groups needed for parents, visually impaired youth, professionals and/or adult role models? How do you make these decisions? This module is designed to help answer these questions.

Why Parent Self-Help Groups ?

Parents of blind and visually impaired youth may have the need to organize a self-help group not only for gaining emotional support through sharing feelings and anxieties, but also to get information on training and placement resources for their children; to learn practical techniques for use at home; or to hear about blind adults who have made successful transitions to work. Through organizing and participating in a group, parents may choose to collectively channel their energies toward advocating for changes in their state to provide their children equal access to vocational education; to develop summer work experience programs or a variety of other needed services/opportunities. Through the group experience parents can move from a sense of powerlessness and gain self-confidence. This enhanced self-esteem can in turn be transmitted/conveyed to the child.

Why Youth Self-Help Groups ?

Students who are blind or visually impaired often need to meet with each other to share a variety of concerns, experiences, plans and fears. Being the only blind student in a community or school can in some cases be a lonely, isolating experience. It is important to know firsthand from another person just how they coped with particular interpersonal and social encounters or events. For example, it may be important to discuss with someone else with the same impairment, just how s/he deals with not being able to drive and how this affects dating, getting to and from a part-time job, or gaining a sense of independence. Perhaps a student wonders if other people discuss their visual loss with sighted friends. There may be the need to share information on specific types of equipment and aids that are useful in school and at home. Potential questions and concerns are too numerous to list.

Why Professional Self-Help Groups ?

Professionals in both education and rehabilitation often may feel the need to give and gain support from each other in their current, everchanging and expanding work roles and responsibilities. They, as professionals, are continually in transition. Relative to the transition needs of blind and visually impaired youth, rehabilitation counselors are being asked to understand and collaborate with the education system which typically provides services to children. Educators are being asked to expand perspectives and programs beyond the classroom and focus on the futures of their students as adults. Both groups of professionals, often (initially) trained in very specialized areas, are being asked to provide special education and rehabilitation services to new populations using new strategies such as supported employment. The current trend toward transdisciplinary teamwork and the continual need to use newly developed and ever changing resource systems (*i.e.*, housing, transportation, recreation, *etc.*) require different competencies often not learned through prior formal training. However, such competencies are critical if professionals are to be effective in developing a full continuum of transition services.

Why Adult Role Model Resource Groups ?

Adults who are blind or visually impaired often have an interest and are motivated to share their personal, social and vocational experiences with visually impaired students, their parents and professionals. This personal expertise is a major untapped resource that can be critical in planning, not only for individuals but also service systems. Though interested in sharing, they may be unaware of a mechanism or systematic method for accessing interested individuals. In the process of sharing there is the added dimension of self-enhancement as one shifts to the role of mentor or helper.

SECTION I

Considerations

The development of self-help or resource groups which focus on common needs or problems may be one procedure your State Transition Team considers as a plan of action. Often such groups are developed to deal with issues not being addressed by existing organizations or other types of groups. Before considering this module as an option it is suggested that the team gather information on existing self-help and resource groups in the state. Based on the identification of these groups and their perceived effectiveness the team can make a more informed decision relative to the need for new group(s). Now, where to begin?

Goals of Self-Help Groups

The broad goals of a support group are to bring about personal and/or social change for its members and society. All of these groups (and there is an almost overwhelming variety) emphasize face-to-face interaction among members and stress a set of values or ideology that enhance members' personal sense of identity and belongingness (Katz and Bender 1976). "Small groups that provide people with a sense of identity, a way to assist themselves and their values, and a sense of empowerment have become increasingly essential to people's lives" (Bender 1976, p. 504). Support groups provide meaning for many individuals struggling with the transitions and issues of daily life (i.e. disability, unemployment, discrimination, isolation, relocation, marital problems, substance abuse, acute and chronic crises).

While team members may have had many experiences with formal and informal groups, they perhaps have not had the time or the need to consider the dynamics of self-help group development and process. However, in order to initiate the development of a group for mutual aid and self-enhancement, knowledge of group process is essential. Perhaps the transition team is considering development of a job club for blind and visually impaired youth seeking employment; a peer self-help group for teenagers; a self-help group for parents of visually impaired youth in transition; a self-help group for professionals based in rural locations, and/or mentoring network using adult role models. This module provides a functional approach for your transition team to use in developing these or similar self-help groups.

Group Process

Gaining insight into the group process is critical. However, the insight gained must be applied when working through the process to achieve a lasting effect. Several suggested activities in this module may contribute to gaining this insight and facilitating action. Doing or experiencing can often be the most effective method of understanding self-help or resource group development and process.

It is suggested that the transition team spend some time discussing the stages of group process, sharing personal group experiences relative to these stages, and discussing application of these stages to the planned development of a self-help group project.

Why do people voluntarily join groups (Katz and Bender, 1976)?

A. They like the task or activity of the group.
B. They like the people in the group.
C. The group can satisfy the personal need to belong through association with other members.
D. The group can be the catalyst for developing personal skills.
E. The group can sustain personal momentum through support.
F. The group can provide a respite.
G. They need information group members have to share.

Activity

List reasons why you have previously joined groups.

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________

Activity

List reasons why you continued to be a member of a group.

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________

Self-help groups have varying aspects of "attractiveness". This "attractiveness" not only determines membership but effects group cohesion and success. Napier and Gershenfeld (1985) list the seven properties of the group that attract membership as:

A. Prestige of the group
B. Group climate
C. Interaction among members (level and type)
D. Size of group
E. Relationship with other groups
F. Actual success and/or perceived potential for success
G. Opportunities for "social comparison" of feelings

Activity

With fellow team members, describe your experiences in a voluntary group by discussing these questions:

1. Was the group cooperative or competitive?

2. What other words would you use to describe the group's climate?

3. Did group members equally share feelings and ideas with each other?

4. Were members supported in sharing their fears or activities?

5. Did you know about the group's success or reputation before you joined? If yes, what?

6. What did you share in common with other members?

7. What was most important to you in remaining a member?

Just as people have reasons for joining support groups, so they have reasons for leaving groups. Some factors decreasing attractiveness of membership are:

1. Membership changes
2. Competition within the group
3. Needs met
4. Group disagrees on how to solve problems
5. Dominating members take control
6. Unreasonable or excessive demands are made of members

Activity

List three reasons you had for leaving voluntary groups in the past.

1. ____
2. ____
3. ____

As was previously indicated, self-help groups emerge or often develop to meet needs that are perceived as not being met by other groups or agencies; these can be very concrete specific needs relative to information and resources, as well as emotional support needs. Both types of needs are very interrelated in that having one need met contributes to achieving the other.

Activity

In reflecting on your reasons for voluntarily joining a group, was it important that the group have clearly defined goals or specific tasks before or at the first meeting?

Yes ________________

No ________________

If you responded yes, your answer is similar to most people who indicate they initially prefer a somewhat structured format for a meeting. Often, as a group "matures" and individual members experience success in having some specific resource and information needs met, they feel more comfortable with a less structured approach and more secure in identifying emotional needs (fears, concerns and anxieties).

Just now, the team may be saying "Well, we think visually impaired teenagers need a self-help group", or "We think it would be great for parents of our visually impaired students to have a self-help group, but how do we let them know or sell them on this idea? We think that such a group would meet some of their needs but if they have never experienced membership or satisfaction in such a group, would they even consider this as a viable solution?"

Activity

Think about the information you gathered or received prior to voluntarily joining a group and what was the most convincing. Did you use any of the below listed? Check if your response is yes.

1. Reading a description of the group and its purpose.
2. Talking to a current member of the group to get

the "real story" on what happens.

3. Following the suggestion of someone you trusted who mentioned to you that they knew of a group of people concerned about issues like yours and thought you might attend a meeting.
4. Other (please describe or discuss)

____

____

____

While the attractiveness of a group and the possibility that you might gain specific information or support are the most important reasons for wanting to join, what other factors listed below may actually determine if you attend. Check if your response is yes.

1. Location of meeting ____
2. Time of meeting ____
3. Day of meeting ____
4. Frequency of meetings ____
5. Membership dues ____
6. Others: ____________________

____

____

Another factor in the attractiveness of a group to new members is, who is in charge or who represents the leadership. Is the leader described as democratic, autocratic, or laissez faire? Is the leader someone who you, as a new member, can identify with? Is the leader someone who uses the entire membership to set goals? Does the leadership share decision-making power with all members?

Activity

Discuss/reflect on the importance of the leader (or leadership) as an attractiveness factor for joining a group. List below important traits a leader of a support group should have for you to join:

1. ____
2. ____
3. ____
4. ____
5. ____

Leadership implies fellowship. Current literature on the topic of leadership is quite profuse with references to trait theory, position theory and situational theory. Hersey and Blanchard (1982) discuss two central dimensions of leadership as being task related and relationship related. An effective leader is someone who is not only skilled but is intuitive and sensitive to the needs of the group. Such a leader is able to adapt his or her leadership style as the situation or needs change. The members may include some people who have had successful group experiences while others may have had unsatisfactory or no similar experiences. The "maturity" of the membership is based on previous group experiences, the immediate membership needs, and other external factors which determine leadership style and effectiveness.

Activity

Sometimes a leader will need to *tell* the membership information, facts, etc.; sometimes there is the need to *sell* an idea or plan; often the membership needs to actively *participate* on issues, and an effective leader *delegates* to the group as much responsibility as is possible. An effective leader has a style that reflects a varied emphasis on task accomplishment, relationship building and group cohesiveness. Is effective leadership a *science* or an *art*? It's a combination! With fellow team members describe examples when an effective leader should:

A. Tell: ____

____

____

B. Sell: ____

____

____

C. Participate: _______________________________________

____

____

____

D. Delegate: ____

____

____

"Maturity of the membership" refers to what members bring to a group--different personal needs and priorities, different interaction styles, individual histories, different perceptions, and diverse group experiences. Once in the group, members assume different types of roles most of which aid in achieving group goals (Napier and Gershenfeld, pp. 24-43, 1985). Some of these roles are:

a. evaluator
b. procedural technician
c. encourager
d. supporter
e. harmonizer
f. gate keeper
g. blocker
h. self-confessor
i. recognition-seeker
j. dominator
k. special interest pleader
l. court jester

Activity

Take time to reflect on the roles each of you played during the past year on the state transition team. Who played which role listed below? (Without a doubt you've seen some role shifts or combinations!)

Role:	Who:
1. Encourager	______________
2. Evaluator	______________
3. Gate keeper	______________
4. Harmonizer	______________
5. Procedural Technician	______________
6. Other (___________________________)	______________

A collaborative planning process is based on reaching decision by consensus. This type of process requires a considerable amount of time for each member to present his/her needs; a considerable amount of time for group discussion of all the needs, and an agreement to focus on certain needs as priorities. Some members may become impatient with this time-consuming process; however, using this approach facilitates a climate of sharing, mutual respect and understanding. Strategies can be used to enchance this process. Expectations and perceptions are shared. A climate is being created which can foster the development of a sense of trust, an environment in which a member can begin to believe s/he may gain support and a sense of belongingness.

Activity

Your state transition team used a collaborative planning process at the Institute. Review whether you initially found this to be time-consuming and inefficient. Did the process become less time consuming and more efficient as the team worked together? Discuss whether you felt this process met information and/or resource needs. Discuss whether or not you felt the process produced a "group climate" that was supportive of all team members. Why or why not? Can you foresee using any components of this process in self-help group development?

SECTION II

Introduction

At this point, shift gears and change your mind-set from reflecting on and reviewing your own group experiences to that of focusing on the transition team's potential role as a catalyst for the development of a support group built on the premise that mutual aid and self-enhancement can best be accomplished through use of indigenous leadership. In other words, build on the strengths, interests and needs of local people.

From a state transition team perspective how do you identify indigenous leaders? This, of course, depends on the target population of people (students, parents, professionals, adult role models or employers). Each of these face similar problems, share common feelings or perceptions, and have common needs for resources and/or information.

Activity

Which is your target group:

A. Students ______

B. Parents ______

C. Adult Role Models ______

D. Professionals ______

E. Employers ______

F. Other (specify) ______________________

What are the characteristics of indigenous leaders you will consider contacting:

A. ____

B. ____

C. ____

D. ____

E. ____

Qualities of leadership you choose to consider may have been described previously in this module. In addition, you may want to consider the following characteristics of potential leaders:

1. Is understanding of another person
2. Is self aware and able to use self as a vehicle of change
3. Is trustworthy
4. Is accepting and non-judgmental
5. Is an active listener who hears not only verbal message but perceives non-verbal messages
6. Is an active responder - "I'm with you" - "Let me clarify"
7. Is someone who doesn't solve the other person's problems nor merely reassure to make them feel better
8. Is willing to learn and teach
9. Is able to communicate effectively
10. Is genuine
11. Is someone who can see him/herself in perspective relative to helping and supporting others

12. Is willing to commit personal time

Why would someone self-select or volunteer to be a leader of a planned support group? Being an indigenous leader provides an opportunity for self-enhancement and personal satisfaction. It provides the opportunity to learn you have something to give. This type of leadership role provides opportunities to become a helper and giver, which in and of itself is a personal growth and healing process.

Activity:

What are some reasons you think individuals may volunteer to be leaders of the proposed group?

1. ______________________________

____

2. ______________________________

____

3. ______________________________

____

4. ______________________________

____

Activity:

Now that you have decided on the target population and have reviewed characteristics of possible leaders how can you find/locate potential leaders?

1. Self-help clearinghouse
2. Consumer Groups (i.e., American Council of the Blind or the National Federation of the Blind, Blinded Veterans Association)
3. Parents Groups (i.e., Parent Teacher Association, National Association for Parents of the Visually Impaired)
4. Public and private agencies for the blind
5. Professional Organizations (i.e., Association for Education and Rehabilitation of the Blind and Visually Impaired, The Council for Exceptional Children/Division for the Visually Handicapped, National Rehabilitation Association, etc.)
6. Public schools and private schools for the blind
7. Other (specify) ______________________________

____

____

Activity:

Who are your identified potential leaders, who will contact them, and when will the contact be made?

Potential Leaders

Name	Phone #	Contacted by:	When	Response

While there are no right or wrong number of people you should select, be reasonable and do not identify a "cast of thousands"! Once you have identified your prospective leaders for the planned group how can you, as a transition team, support them as they take charge (assume the responsibility) for _facilitating the development of a support group_? A basic premise of forming groups for the purpose of mutual aid and self-enhancement is to have lay people avoid reliance on professionals. While this is the ideal, a rule of thumb to consider is _"don't throw the baby out with the bath water"_. Your level of ongoing support to the group should ultimately depend on requests for continued involvement. While this may seem risky, it is a slow process which promotes self-sufficiency, enhances self-esteem and reduces dependency on "the system". What are some types of training or consultation you as a transition team may provide _or_ secure for the self-help group?

Self-Help Group Development

The remaining portion of this module presents content which should be shared with potential self-help group leaders during training. When evaluating potential trainers use the following content to determine their familiarity with self-help groups and group process.

Helping You Helps Me, published by the Canadian Council on Social Development (Hill, 1984), is a primary resource and a practical guide to starting and maintaining self-help groups. Guidelines presented in this part of the module are quoted from this resource.

> "Defining the purpose of your self-help group includes setting goals, objectives and priorities. It also includes determining the methods you will use to accomplish the priorities. A clear statement of purpose, and a plan to accomplish that purpose will be useful in later activities of the group." (Hill, p. D-3)

Activity No. 1. (Self-Help Group Development Activity) Now that you have identified the target population and potential leaders, you will need to schedule an initial organizational meeting. It is at this meeting you will have the opportunity to introduce those indigenous leaders to the prototype for self-help group development which follows. Once again, you are cautioned to gauge your level of involvement to the group's requests for input. Be careful to constantly share leadership roles and responsibilities as the concepts are discussed and activities planned.

Date of initial meeting: ______________________________

Location of meeting: ______________________________

Time of meeting: ______________________________

Persons attending meeting: ______________________________

Understanding the purpose for which the group exists involves both the what (goals, objectives and activities) and the how (methods and strategies). Both are equally important.

> "Determining goals, objectives and priorities takes some time. Your organizing group may want to spend several sessions to do it. It might be helpful to spend one session putting together a rough list of goals and objectives, and then go away and think about them for awhile. The next time you get together, you could double-check your goal and objectives statement with the whole group. The group could then talk together about setting priorities. As you set your priorities, it could be helpful to outline the reasons for your choices. Keep in mind that some objectives may not be possible to accomplish until after others have been done.

You may want to set an objective that is easy to accomplish as one of your beginning tasks. Getting a `success' under your belt will encourage the group to keep working" (Hill, p. D-2).

Activity No. 2. (Self-Help Group Development Activity) While ideally, you might want to spend several meetings determining goals, objectives and priorities, doing this depends on the group composition. In many cases, it is important to quickly establish a pattern of documenting -- in writing -- the group's efforts. Consensus planning and decision-making are critical.

List Group Goals: ______________________________

____

____

____

____

____

List Priority Goal: ______________________________

____

____

____

____

____

List Objectives: ______________________________
____
____
____
____
____

Prioritize Objectives: __________________________
____
____
____
____
____

The next step is to determine the best strategies. There are many possible strategies which can be used to accomplish the identified objectives. Determining the best way involves discussion and compromise. An effective way to start is by listing all your prioritized objectives and listing all the possible strategies the group can think of to accomplish each one. Accepting the first idea is not necessarily the best way.

List as many possible strategies as group members can come up with, and then choose the best one. "The best strategy is chosen according to what the group thinks is to be gained or lost by each choice. Remember that there may not be a perfect method, but there probably is one that the group agrees is better than the others" (Hill, pp. D-2-3).

Activity No. 3. (Self-Help Group Development Activity)
Brainstorming is valuable as you involve all group members in choosing strategies to meet your prioritized objectives:

List Priority Objective No. 1: ______________________________

Strategies to Achieve Objective: ____________________________

____

____

Preferred strategy which group agrees on from the above list: ____

____

"Who can join the group and who cannot? Your organizing group will probably have given some thought to this as you defined the target population. It's also a good idea to review your ideas before you begin to recruit more members" (Hill, p. E-1).

* * * *

"The limits your group places on membership will mean that you'll have to say "no" to some who want to be members. Your group will probably want to be fairly clear about its reasons for excluding people" (Hill, p. E-2).

* * * *

Self-help groups usually put few requirements for membership. They make it easy for people to join and to leave the group" (Hill, p. E-2).

Activity No. 4. (Self-Help Group Development Activity) Since you have selected a target population for self-help group development, do you think it is important to have other requirements for membership? Yes ________

No ________

If Yes, what are they?

1. ________________________________
2. ________________________________
3. ________________________________
4. ________________________________

"Self-help groups and professionals can help each other. In working together both need to be sure the interests of the members of the self-help group come first, and that the group as a whole agrees on the task the professional person will carry out" (Hill, p. F-3).

Activity No. 5. (Self-Help Group Development Activity) How do you think professionals could serve as resources to your self-help group?

Please list:

1. ______________________________

2. ______________________________

3. ______________________________

4. ______________________________

What Are Four Stages of Group Development

Self-help groups often go through four stages -- forming, norming, storming and performing. Disagreement occurs, but in the end, the group pulls together.

FORMING

"In the beginning, a few people will meet and talk over their interests. In the 'forming' stage they'll try to find others who share their concerns. They may hold a public meeting or two. The meetings probably won't follow any particular way of behaving in the group. The level of discussion may not be too open at this stage. This is because people have to learn to trust each other before they are completely open about their thoughts and feelings" (Hill, p. H-1).

NORMING

"During the next stage, the 'norming' stage, the outreach will continue. Perhaps the group will think about developing relationships with other groups or with professionals or respected lay people. The routine of meetings will begin to be set. Members will probably begin to take on certain roles. Discussion will probably begin to be more open, and friendships will begin to develop. The purpose of the group will be agreed upon.

Activities to carry out that purpose will be developed. Expectations of behavior will also develop, for example, 'no smoking,' 'coffee after the meeting,' 'we don't discuss money problems.' These expectations might not be said out loud, but will develop anyway" (Hill, p. H-1).

STORMING

"During the third stage it would be a natural thing for some disagreement to surface. This is called the 'storming' stage. People might not like the purpose of the group, its planned activities, or the expectations. This kind of disagreement almost always happens" (Hill, p. H-1).

PERFORMING

"The group will finally get down to business during the fourth stage. In 'performing' stage the roles of members will be set (this happens naturally, and without a word being said). The expectations for behavior are set. The purposes and activities have been agreed to and trust among members will be developing. Discussion will become more open. While disagreements may come up, they'll probably be over minor issues" (Hill, p. H-2).

CHANGING PURPOSE

"Over time, the group may gradually move away from its original purpose. That can be fine, but it can also cause disagreement. An occasional look at whether or not the group is still doing what it was set up for can help avoid problems caused by shifts in purpose. The group may want to rewrite its goals and objectives if the shift is a major one" (Hill, p. H-2).

Self-help groups have three kinds of needs to deal with--task, maintenance, and self-oriented. Individual members take actions to meet all three of these needs. Task and maintenance needs must be met if the group is to stay lively and effective. "Task Needs" focus on getting the job done and are being met when members get the meeting started; help keep it moving, give information, summarize events, check to see if people agree.

Activity No. 6. (Self-Help Group Development Activity)
What are some task needs of your group?

1. ____________________
2. ____________________
3. ____________________
4. ____________________

Are they being met?

"A second kind of group need is the maintenance need -- that is, things that members do in the group to help it work more effectively. Maintenance needs are being met when members compromise, add humor to a meeting, support others who speak, encourage compromise in disagreements. Self-help groups sometimes pay more attention to maintenance needs than to task needs. This is because self-help groups are often mainly interested in the social and emotional needs of their members" (Hill, p. I-1).

Activity No. 7. (Self-Help Group Development Activity)

What are some maintenance needs that occur regularly in the group? Meeting these needs contribute to individual's comfort level.

1. ____
2. ____
3. ____
4. ____

"A third type of need is also seen in self-help groups. The self-oriented needs that some members display can make it very difficult to meet the group's task and maintenance needs. These self-oriented needs may come up because a member is not happy with what the group is doing. They might also come up because of some personal problem" (Hill, p. I-2).

Activity No. 8. (Self-Help Group Development Activity)

Discuss and list strategies the group can use to systematically (and in a nonjudgmental manner) respond to self-oriented needs:

1. ____
2. ____
3. ____
4. ____

"Leadership is a process that is made up of qualities of individuals, interaction between group members, and various styles of doing things. In self-help groups, facilitating is a leadership skill and style that can strengthen the group. It is a type of leadership that can be shared among group members. More formal styles of leadership may be of more interest to the more formal self-help groups" (Hill, p. J-4). Leadership is often thought of as an ability that some people have and some people don't. It is, in fact, a process. It is an action, not a fixed quality" (Hill, p. J-1).

"Gaining the confidence of other people, being able to act swiftly and decisively are leadership qualities. However, not all people who have these qualities are leaders. Why? Because leadership requires the interaction of both the potential leader and the potential follower" (Hill, p. J-1). If the needs of the potential follower aren't met, then he will prevent the leader from carrying out that role. Through leadership, the needs of individual people, as well as the group as a whole must be met" (Hill, p. J-1). "Leadership can be a responsibility that is shared by the group. Different members can perform different leadership roles according to their own special abilities" (Hill, p. J-2).

Activity No. 9. (Self-Help Group Development Activity)

Have you ever thought of leadership as a process, an action, not a fixed quality? Yes ____ No ____

Discuss and list strategies your group will use to assure that leadership is shared:

1. ______________________________

2. ______________________________

3. ______________________________

4. ______________________________

"The leadership role can be looked at as a job of facilitating the group to accomplish its purpose. Leadership can be seen as encouraging discussion, action or decision! Many group members will have some skills at facilitation. The person who's particularly able at one skill will probably be willing to carry out that role in the group" (Hill, p. J-2).

"Important facilitation skills are:

A. Keeping members on topic.
B. Summarizing what members have said.
C. Accepting feelings as okay.
D. Suggesting ways to solve a problem.
E. Summarizing and clarifying direction or decision" (Hill, p. J-3).

"Because this approach to leadership relies on shared responsibility for the groups, the members may want to share other responsibilities. If the group has formal officers such as chairperson, treasurer, etc., the rotation of these assignments will help people develop their skills and add life to the group" (Hill, p. J-3).

"All groups will notice attempts of members of other groups to influence behavior within the group. Recognizing the factors at work can help deal with influence. The feeling members have about `togetherness' of the group will affect their involvement. Members do come and go, and that's to be expected" (Hill, p. K-6).

"Circumstances are also important. If group members feel threatened they're more likely to successfully resist than if the outside pressure is mild. Group members who know each other very well are more likely to be influenced by an outside group than if they don't know each other too well. (Because it is likely that little trust will exist among people who are newly acquainted, they're less likely to accept outside influence.) That also means that groups which are very 'together' can be effective at influencing other groups. The more dominant the person or group is, the more successful they are likely to be. The strength of the method used to influence is important, especially if the person being influenced is resistant. If there's little resistance or argument, the methods matter less" (Hill, p. K-3).

"Another factor in how groups keep going is the feeling that people have about being part of the group. The cohesiveness of the group gives members feelings of belonging. It helps people who want to take part in activities. Togetherness adds to members' feelings of commitment to the group and other members. They also feel more likely to change their lives in line with the group's expectations. Cohesion describes how attractive the group is to its members. It is affected by two sets of factors. One is the characteristics of the group, that is, its purpose, its style of operating, etc. The second factor is the characteristics of individual members. The 'togetherness' of your group can be assessed by looking at such things as absenteeism, and at the degree of familiarity between members. You can also look at the amount of supporting and accepting communication that takes place" (Hill, p. K-4).

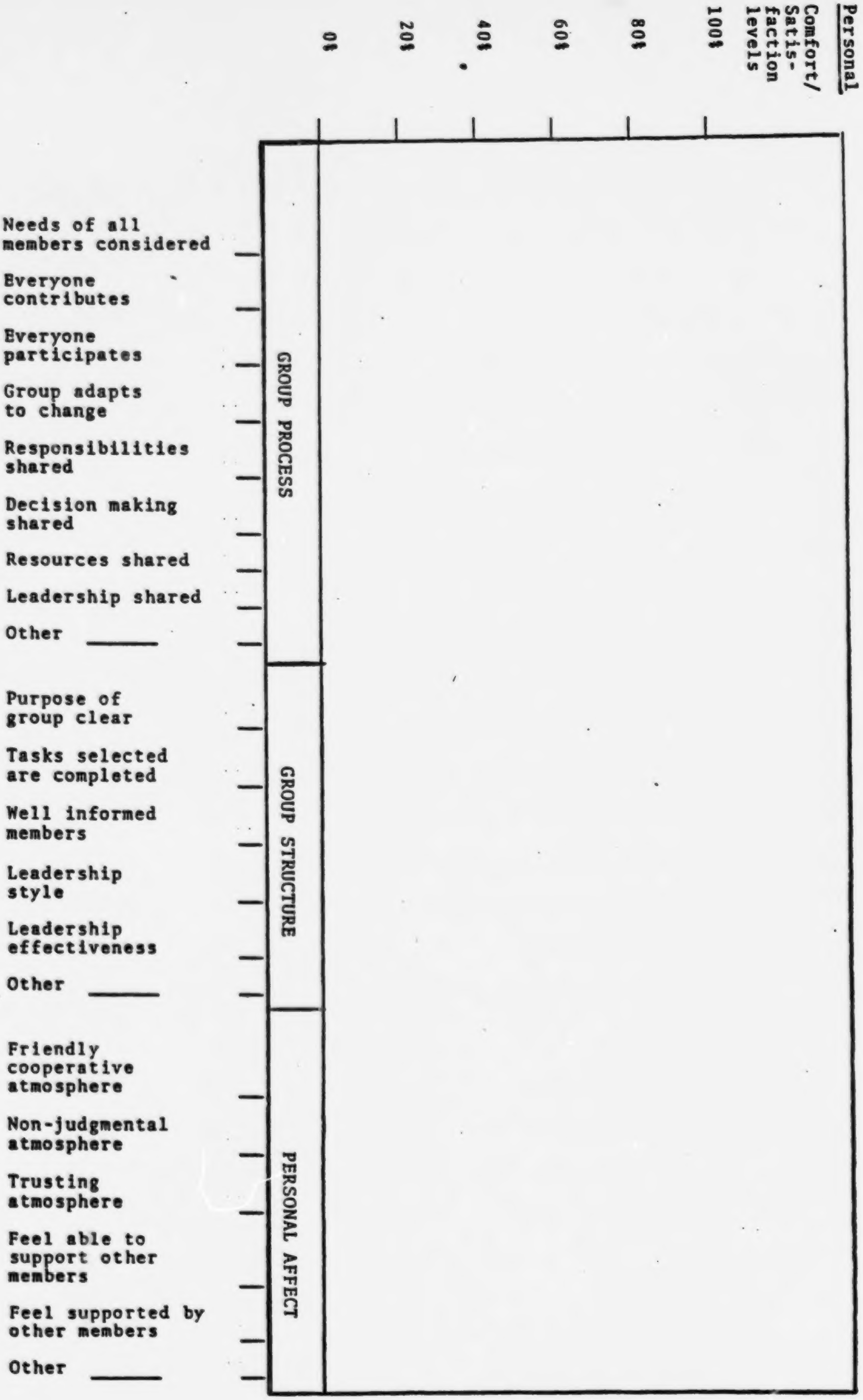
Activity No. 10. (Self-Help Group Development Activity)
List characteristics that you feel accurately describe your group:

1. ____________________
2. ____________________
3. ____________________
4. ____________________
5. ____________________

Conclusion

Use the following "Climate Chart" at various times during self-help group development to document individual members' levels of comfort and satisfaction. This type of exercise not only recognizes individuals' needs, but provides clear-cut evidence of the health of the total group through combining individuals' charts into one composite "Group Climate Chart". It is a tangible method of showing the interrelationship between the group climate and individuals' perceived levels of mutual aid and self-enhancement. This can lead to sharing of ideas that lead to group cohesion, maintenance and effectiveness. It is a method for individual self-discovery in the context of a supportive environment.

SELF-HELP GROUP CLIMATE CHART



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Katz, A. and Bender, E., (1976) The strength in us: Self-help groups in the modern world. New York: New Viewpoints.

Napier, R. and Gershenfeld, M., (1985) Groups: Theory and experience. (Third Edition). Boston: Houghton Mifflin Company.

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Resources

CALIFORNIA-Bay Area Self-Help Clearinghouse
San Francisco Mental Health Association
Mara Weiss, Director
2398 Pine Street
San Francisco, California 94115
415 921-4401

CALIFORNIA-California Self-Help Resource Center
UCLA, 2349 Franz hall
Carol Eisman, Public Education Specialist
405 Hilgard Avenue
Los Angeles, California 90024
213 825-3522

CALIFORNIA-Sacramento Self-Help
Mental Health Association of Sacramento
Janet Manfred, Coordinator
5370 Elvas Avenue
Sacramento, California 95819
916 456-2070

CALIFORNIA-San Diego Self-Help Clearinghouse
Ellen Murphey, Director
1172 Morena Boulevard
San Diego, California 92103
619 275-2344

CONNECTICUT-Self-Help/Mutual Support Network
Consultation Center
Vicki Shapiro Smith, Coordinator
19 Howe Street
New Haven, Connecticut 06511
203 789-7645

ILLINOIS-Self-Help Center
Leonard D. Borman, Ph.D., Director
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KANSAS-Sedgwick County Self-Help Center
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316 686-1205

MICHIGAN-Barrien County Self-Help Clearinghouse
Riverwood Community Mental Health Center
Rob Hess and Charles Livingston, Coordinators
2681 Morton Avenue
St. Joseph, Michigan 49085
616 983-7781

MINNESOTA-Mutual Help Resource Center
Wilder Foundation Community Care Unit
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NEBRASKA-Self-Help Information Services
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402 476-9668

NEW JERSEY-Self-Help Clearinghouse
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201 625-9565

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NEW YORK-Self-Help Clearinghouse
Mental Health Chapter of
Rochester/Monroe
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NEW YORK-Self-Help Clearinghouse
The Volunteer Center, Inc.
115 East Jefferson Street
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NEW YORK-New York State Self-Help Clearinghouse
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NEW YORK-Westchester Self-Help Clearinghouse
Westchester Community College/AAB
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ATTN: Dr. Leslie Borck
914 347-3620

OREGON-Portland Self-Help Information Service
Nancy Barron, Director
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Portland, Oregon 97209
503 222-555/229-4040

PENNSYLVANIA-Philadelphia Self-Help Clearinghouse
John F. Kennedy, CMHC
Jared Hermalin, Director
112 North Broad Street, 6th Floor
Philadelphia, Pennsylvania 19102
215 568-0860 Ext. 266

PENNSYLVANIA-Self-Help Information and Networking Exchange
Voluntary Action Center of NE Pennsylvania
Arlene Hopkins, Executive Director
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TEXAS-Mental Health Association of Dallas County
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TEXAS-Tarrent County Self-Help Clearinghouse
MHA of Tarrant County
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VIRGINIA-Greater Washington Self-Help Coalition
MHA of Northern Virginia
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WISCONSIN-Mutual Aid Self-Help Association
MASHA
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TRAINING MODULE III

PUBLICATION DEVELOPMENT

SECTION I

INTRODUCTION

Before you decide that a publication of some kind is an appropriate and effective way to meet your state transition goals, needs, and objectives, answer the following questions:

1. What is your purpose?
2. Who is your audience?
3. What is your budget?
4. How will you secure funds?
5. What is your format going to be?
6. How often will you publish?
7. What information will you cover?
8. How will you design the publication?
9. How will you find a designer?
10. How will the first publication/issue look?
11. Who will write for the publication?
12. Who will edit the publication?
13. How will you duplicate it?
14. Who will duplicate it?
15. To whom will you distribute it?
16. How will you distribute it?
17. How will you evaluate its effectiveness?

A. Questions to Answer

What is your purpose? This question is the first you need to address. By answering this question you will be better able to determine not only a clear statement of purpose but also whether or not your state transition needs, goals, and objectives can be best met by the development of a brochure, pamphlet, flyer, poster, or newsletter.

1. Using Part I of this manual list your identified:

Needs:

a. ____________________

b. ____________________

c. ____________________

d. ____________________

Goals:

a. ____________________

b. ____________________

c. ____________________

d. ____________________

e. ____________________

f. ____________________

Objectives:

a. ____________________

b. ____________________

c. ____________________

d. ____________________

e. ____________________

f. ______________________________

g. ______________________________

h. ______________________________

i. ______________________________

j. ______________________________

k. ______________________________

2. Develop a statement of purpose for your publication.

Statement of Purpose: ______________________________

3. Identify the target audience for your publication and set parameters. (Examples, employers, health care providers, 500 largest employers in the state, trade associations, or hospitality industry, etc.).

Target Audience: ______________________________

4. Determine amount of funds available and budget manager.

Funds available from AFB ____________

Funds available from other sources ____________

Total ____________

Budget Manager: ______________________________

5. Explore various format options and check the one you agree on

Brochure ________

Pamphlet ________

Flyer ________

Poster ________

Newsletter ______

Others (specify) ____

____

____

6. Determine how often you will publish and check the one you agree on.

Once ________

Bi-annually ________

Annually ________

Quarterly ________

Bi-monthly ________

Monthly ________

Other (specify) ____

____

7. What information will you cover in your publication? (Examples, model programs, work experience vignettes, success stories, training opportunities, employer benefits of hiring blind/visually impaired youth, etc.).

Information to be covered:

a. ____

b. ____

c. ____

d. ____

e. ____

f. ______________________________

g. ______________________________

h. ______________________________

i. ______________________________

j. ______________________________

8. How will you design the publication. List ideas that you can discuss as possibilities with an expert.

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

e. ______________________________

9. How will you find a designer? Identify possible contacts team members may know. Check with agencies and organizations with which you are affiliated and determine whom they have used. Check all possible resources. List possible designers with full name, address and phone numbers.

a. Name ______________________________
Address ______________________________
Phone # ____________________

b. Name ______________________________
Address ______________________________
Phone # ____________________

c. Name ______________________________
Address ______________________________
Phone # ____________________

d. Name ______________________________

Address ______________________________

Phone # ______________

e. Name ______________________________

Address ______________________________

Phone # ______________

10. Discuss how you want the publication to look or what "philosophy" you want the publication to have. Be creative and list characteristics you want the publication to have.

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

e. ______________________________

f. ______________________________

g. ______________________________

h. ______________________________

i. ______________________________

j. ______________________________

12. Who will be responsible for writing/developing the text of the publication?

Publication Chairperson/Editor: ______________

Contributing Writers: ______________________

____

____

____

13. How will the publication be duplicated--printer, agency, photocopied, etc.

Duplication: ____________________

14. Who will duplicate the publication?

Duplicator: ____________________

15. To whom will it be distributed?

Target Audience: ____________________

Mailing list(s) available from: ____________________

Individuals responsible for procuring mailing list(s):

Individuals responsible for preparing labels, envelopes, mailings:

16. Explore means by which you will evaluate effectiveness--phone reply requests, tear-off reply cards, tracking recipients involvement, etc. Be creative!

a. ____________________

b. ____________________

c. ____________________

d. ____

e. ____

f. ____

g. ____

Regardless of whether you are planning to do a brochure, pamphlet, flyer, poster or newsletter it is recommended that you read the next section, as much of what follows is relevant to posters and newsletters.

Having completed Section I of this module you should have a better idea of whether or not your state transition team can best meet the transition needs in the state through a publication.

SECTION II

PREPARING A BROCHURE/PAMPHLET/LEAFLET

A. Introduction

The following are suggested guidelines and points to consider when developing a brochure, pamphlet or leaflet. Many of the suggestions are also relevant if you are considering the production of a poster or newsletter. The basis for these guidelines was developed by Jane Maas, author of Better Brochures, Catalogs and Mailing Pieces (1981). It is suggested that you work through the following steps and reach consensus as a team.

B. Five Key Points to Determine

The five key points to determine are the:

1. Objective
2. Target audience
3. Reader's benefit
4. Credibility factors
5. Tone and manner

1. Objective

Now that you have explored possible objectives in Section I, answer the question, "What is the one major objective you want your brochure/pamphlet/leaflet to accomplish?" For example: do you want to convince the major industrial employers in your state to participate in work experience programs for blind/visually impaired youth in your state?

Objective: ______________________________

____

____

____

2. Target Audience

Now that you have decided to prepare a brochure, pamphlet or leaflet finalize your decision as to, "Who is your target audience?" You cannot design a brochure/pamphlet/leaflet to address everyone. Trying to do so will result in wasted time, energy and money.

Target Audience: ______________________________

____

____

____

3. Reader's Benefit

There should only be ONE key benefit for the reader (target audience). For example: answer the question, "Why should the employer become involved in providing work experiences for blind/visually impaired youth?" List the benefits for the readers you have targeted and determine the one most convincing/relevant benefit.

List all possible benefits:

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________

5. ____________________

6. ____________________

7. ____________________

8. ____________________

One major benefit: ____________________

____

4. Credibility Factors

You need to identify a reason for the reader to believe the message you are giving in your publication. Provide true information based on data and facts. Example: handicapped individuals have been proven to be prompt, conscientious, spend more time on tasks while on the job, and have fewer absenteeisms.

List credibility factors:

1. ____________________

2. ____________________

3. ____________________

4. ____________________

5. ____________________

6. ____________________

One major credibility statement: ____________________

____

____

____

5. Philosophy

The philosophy you are trying to promote must be clear, concise, and relevant. It should be unique to your effort and represent blind/visually impaired youth in transition. These may be the same you listed in Section I item 10. Should they be modified, some eliminated or have you thought of additional concepts? List the philosophies you want to demonstrate through your publication.

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________
7. ______________________________
8. ______________________________
9. ______________________________
10. ______________________________

C. Eight Strategies

Keep in mind that you are advocates for youth in transition, therefore you need to promote, or if you will, "sell". In developing your approach consider the following strategies:

1. Set yourself apart from what others are doing. Look for a niche other groups are not addressing or filling.
2. Study your competition. Gather brochures developed by other groups. Examine them carefully and determine the

objective and reader's benefits in each. Ask yourself, can you say it better or can you provide more credibility to make it more believable.

3. Understand your target audience. You don't need to spend a lot of money on sophisticated research, but do budget some money for an effort to determine and identify your target audience. Find out who they are, what their chief appeal is, and both positive and negative perceptions. Ask them.
4. Make the benefit meaningful. The benefit to the readers must be important to them. You need to convince them that the benefits outweigh any special effort or risks.
5. Make the benefit believable. Convince the reader with a reason to believe what you are presenting. Give facts, show photographs, use statistical findings, use testimonials for authenticity or cite research. Provide supportive statements of the identified benefits.
6. Be single-minded. The publication cannot be all things to all people. If you have more to say do it in another brochure/pamphlet or flyer.
7. Develop a product personality. Develop a theme, logo, phrase and image.
8. Stay with your determined strategy. The basic nature of your brochure and follow-through publications should remain constant even if you change or modify the appearance and copy of the brochure/pamphlet or flyer.

D. Basic Principles for Brochures, Pamphlets/Flyers

Maas (1981) recommends the following principles or "rules" for producing effective and quality brochures.

1. Put selling message on the cover. Keep in mind that the majority of readers may not go beyond the cover. The cover must give the reader the incentive to look inside. Use the cover to state your position or promise a meaningful benefit to the reader. Be sure the cover tells--who you are, where you are and what you offer.
2. Be consistent. Follow the same strategy, expand on the theme, use the same graphics or logo. Take advantage of the effect that occurs when the brochure restates the theme.
3. Use a single illustration on the cover. Research demonstrates that one large illustration is more effective than several small ones. Illustrations with story appeal that involve the reader add to the impact. Use bright colors.
4. Choose pictures that tell a story. The right photograph cover can express your position, philosophy, and statement better than words. The right photograph can get the attention of the readers and make them ask "What is happening here?"
5. Always put captions under the photograph. Research shows that captions are read more frequently than text. Next to the cover, captions are the most read element of

any brochure. Captions should provide a lot of information.

6. **Avoid cliches.** Do not use "typical" illustrations, e.g. blind student reading braille. Do not use verbal cliches either. It is more difficult to produce new ideas than to borrow old ones, but the harder work will pay off.
7. **Don't hesitate to use long copy.** The readers are hungry for information, especially if they are considering getting involved. Tell them everything they need to know.
8. **Spotlight important facts.** Graphic devices can help to spotlight important information.
9. **Use photographs instead of drawings.** Research indicates that photographs increase recall 26% over drawings. They also suggest reality and stir the reader's imagination as drawings cannot. They can also make your statement more believable.
10. **Be helpful rather than clever.** Avoid gimmicky layouts and humorous copy--unless it contributes to the message. Give the reader practical, useful information.
11. **Make your brochure, pamphlet, flyer worth keeping.** Make it easy to file, fold, unfold, etc. Consider having it unfold into a poster, use as a calendar, etc.
12. **Produce a quality publication.** Don't skimp on quality. Think of the brochure as your product and as representing blind/visually impaired youth in transition. The

cheapest route may end up being the most costly if it doesn't do what you want it to. If the budget is small do a small publication with fewer pages, or an elegant black and white piece instead of multiple colors, or consider a color cover and black and white inside. Using two colors throughout is another alternative. Inexpensive, but quality, pieces can be just as effective as expensive ones.

13. **Tell the truth.** The readers want the truth, the facts. They do not want exaggerated promises that can't be kept. They want to know the advantages and disadvantages. Disclosing negative aspects can work in your favor.
14. **Use the envelope to deliver a message.** If you plan to mail the piece tease the reader, whet the appetite, or promise a benefit for reading on. For example, "Be a part of the future!"
15. **Ask for action.** What action do you want the reader to take--write, call, participate in a program? The brochure, pamphlet or flyer should contain a clear call to action.

E. The Layout

The key to good design is clarity. Good design aids communication. Do not hesitate to hire a consultant who has graphic design expertise.

Size, Shape and Stock

1. Make the size appropriate to the use. Four-by-nine inch pieces can be mailed in a Number 10 envelope. Larger brochures, eight and one-half by eleven can also be mailed in standard envelopes. If the size is unusual then it requires special envelopes, adding to your expenses.
2. Some shapes impose size limits. Experts say that pieces that unfold into eight panels or sixteen pages is the limit. For accordian pleated publications five or six folds is the maximum.
3. Paper stock and paper color affect your image. Glossy paper and bright colors suggest a sleek and modern image. Textured paper and subdued colors convey richness, dignity and tradition. Choose the type of paper and colors that enhance the image you want to communicate.

Overall Layout

1. Keep it simple. Don't clutter your product. White space is soothing. Don't pack every inch with text and photographs.
2. Surprise the reader. Special units, such as gatefold pages which unfold into spreads, add unexpected effects.
3. One photograph should dominate a page. One good photograph is worth more than several inferior ones; it can also add drama and help readers to focus their thoughts.

4. Be consistent. If you repeat certain types of information use the same area of the pages to do so.

Photography

1. Plan a "shot list". You know your subject matter better than any photographer. Write descriptions of all the subjects/scenes you want photographed. Give the photographer an opportunity to exercise creative judgment.
2. Every photograph should make a selling point. Ask, "What is unique about what you are saying? What is important about what you are saying?"
3. People are interested in people. Photographs of interesting faces can add a human dimension to your statement.
4. Blow up small details for added impact. For example, a closeup of a tactile skill rather than a full body shot.
5. Agree on photographic fee in advance. Contact several photographers and determine estimated fees. Most work by either the day or fixed fee to cover the subjects agreed to. Expenses such as film, meals on location, and transportation are generally additional. Get agreement in writing. Ask for a "buyout" of the photographs so you will have ownership of all negatives and their unlimited use.
6. Stock photographs can save money. You may be able to use photographs that are available through your in-state programs. Be sure you clear not only the school's or

agency's rights but permission of the student and parents.

7. Get photograph releases. Honor confidentiality and be sure permission to use any photograph is obtained in writing. Specify how it is to be used, for what purpose and distribution plans.
8. Classic styles date less quickly. Clothing, hair styles and equipment date pictures. You can't avoid the problem completely but classic styles can save you the trouble of frequent updates.

Typography

1. Select typefaces for readibility. The type should enhance the message, not draw attention to itself. There are hundreds of typefaces to choose from. Select carefully. Generally, body copy or text set in upper and lower case is easier to read then copy set in all capital letters.
2. Do not mix typefaces. You are better off staying with the same typeface family for any one publication. You can use the same typeface with different weights--medium, bold, demi-bold--for different purposes within the publication.
3. Avoid type size smaller than 8 points. Books for general readers are set in 10 point or larger, magazines range from 8 to 11 point.
4. Avoid printing long copy in reverse type. Reverse type

is white type on a color. Although this can have a dramatic effect, if overdone it can be tedious and therefore reduces readership.

5. Consider using large print. The use of large print (12 to 18 point) can serve to demonstrate what may be used by some visually impaired youth in transition.

F. Ways to Save Money on Production

1. Rely on experts. It pays to use professionals who know the business. You are the content experts but there are art production experts who can save you time and money and give you a better product.
2. Consider getting three print bids. Unless you have a connection or use of a quality printshop get three bids from reputable printers. Ask to see samples of each bidder's work.
3. Develop a production schedule and write it down. Professionals generally suggest you allow sixteen weeks from start of production to delivery. The outline should identify each step of the process. Include dates for each step of the process, writing of text, approval of copy and layout, selection of photographs, preparation of mechanicals, delivery to printer, first proof from printer, press approvals, and distribution, etc. Include time for corrections between every step. Text may need to be rewritten, photographs may need to be retouched. Do not assume everything will be correct the

first time.

4. Order paper early. If producing the publication yourself select and order the paper early as the cost continues to rise and orders are often delayed.
5. Approve copy before typesetting. Resetting type is costly and major changes can be a big waste of funds. Read copy carefully for content and spelling. Have several individuals who are unfamiliar with the material read it over as they are more likely to spot errors. Proofreading procedures must also be completed after type is set. You do not have to pay for printer's errors.
6. Many small photographs mean larger production costs. A page with one large photograph is less expensive to produce than a page with many small ones.
7. Consider delivery costs. The weight of the brochure, pamphlet or flyer is important as you consider how you want to mail it -- first or third class. Will you send a cover letter with the publication? Consider the added weight and your budget.

G. Some Additional Tips

1. Involve the reader. One approach to use is quizzes, another is to ask questions. The better the involvement device fits the interests of the target audience, the better it will work.
2. Be human. Keep in mind you are writing for one individ-

ual reader, not a crowd. Be warm and personal.

3. Be first class. Nobody wants to support or become involved in a second rate effort or invest time or money in a third rate program.
4. Monitor the effectiveness of your product. Determine if it is working. Include some way for the reader to respond by giving addresses, names, phone numbers, organizations, or reply card.
5. It does not have to be expensive to be good. If tastefully and well done a black-and-white or two-color leaflet can be just as effective as a four colored glossy expensive looking piece. Tasteful presentation and useful information are key factors.
6. Pool your efforts. Work together with agencies, schools and organizations to stretch your dollars and make your publication available to a larger audience.

SECTION III

PREPARING AND DISTRIBUTING A NEWSLETTER

If you are planning on developing a newsletter you should have worked through all the prior sections of this module as many of the points are relevant and will not be repeated here. This section will highlight only those guidelines specific to newsletters or which warrant repeating.

The information presented here, for use as guidelines in the development of a Newsletter are from Newsletters A Guide to Editing, Design and Production produced by Promotional Perspectives in Ann Arbor, Michigan (no date).

As with brochures, flyers, and pamphlets you need to identify needs, goals, objectives, statement of purpose, target audiences, format options, frequency of publication, etc. Therefore you can work through the majority of the first section of this module effectively keeping a newsletter in mind. Some considerations unique to a newsletter which you should give some thought include the following:

A. A Priced Publication?

Can you sell your newsletter? Before you reply negatively, consider the potential impact of your newsletter. Consider the services and techniques you can report in your newsletter. Do not be too hasty in your decision. Discuss and explore possibilities.

B. Long and Short Term Objectives

After you have developed your statement of purpose, develop both short and long term objectives. These should be more precise than a general statement of purpose. Long term objectives can help establish departments within a newsletter, whereas short-term objectives can help determine the focus for individual stories.

Short-Term Objectives

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____

Long-Term Objectives

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____

C. General Content

Discuss, and tentatively determine the percentage of space you want to devote for various sections.

News Items: ____________________%

Feature Stories: ____________________%

Calendar of Coming Events: ____________________%

Resources: ____________________%

Recent Publications: ____________________%

Other (specify) ____%

Other (specify) ____%

Other (specify) ____%

Total 100%

This need not be a rigid formula. Thinking about what you want to present and in what amounts will help you plan and produce a publication that meets your state's transition needs.

D. Choosing a Name for the Newsletter

Choose a name that will reflect the image or "personality" which you want to convey -- formal/informal, contemporary/ traditional, etc. List names of newsletters familiar to you. This will help you to see the possible range as well as exclude using those already in existence.

List of Known Newsletters

1. ______________________ 6. ______________________

2. ______________________ 7. ______________________

3. ______________________ 8. ______________________

4. ______________________ 9. ______________________

5. ______________________ 10. ______________________

Potential Names for Newsletter:

1. ______________________ 6. ______________________

2. ______________________ 7. ______________________

3. ______________________ 8. ______________________

4. ______________________ 9. ______________________

5. ______________________ 10. ______________________

Name of Newsletter: ____

E. Scheduling

Try to maintain a realistic schedule from one issue to the next. Expect to go through a process of trial and error. Use expert advice and resources to thoroughly prepare for your effort.

Structure a schedule sheet which lists all stages involved in planning and producing the newsletter. Include the smallest of details and order the list chronologically. A sample production schedule checklist is provided on the following pages. Reassess your schedule target dates as you proceed and adapt accordingly for following issues.

EXAMPLE

Excerpted from Newsletters A Guide to Editing, Design and Production (no date)

PRODUCTION SCHEDULE WORK SHEET I

Determine the number of working days (or fractions of days) needed for each stage. Use the stages below or make your own step-by-step list.

Stage	Working Days to Complete
1. Preliminary planning session.	
2. Final planning session.	
3. Story assignments distributed.	
4. Preliminary drafts completed for review. . .	
5. Drafts approved.	
6. Stories submitted for editing.	
7. Editing and copyfitting completed.	
8. Stories approved.	
9. Copy specked and to typesetter.	
10. Galleys from typesetter.	
11. Galleys proofed.	
12. Photocopy mock-up completed.	
13. Galleys corrected.	
14. Paste-ups completed for printing.	
15. Paste-ups proofed and approved.	
16. Paste-ups to printer.	
17. Bluelines/silverprint approved.	
18. Printing completed.	
19. Distribution completed.	

For each issue of your publication, start with the date on which distribution should be completed. Using a calendar, count backwards from that date for each stage. (Remember to count only working days, not weekends or holidays.) Fill in those dates on Production Schedule Work Sheet II.

EXAMPLE

Excerpted from Newsletter A Guide to Editing, Design and Production

PRODUCTION SCHEDULE WORK SHEET II

If your publication steps match those listed below, complete this chart. If they differ, make your own chart that lists every stage of planning and production that you, your staff and outside services must complete.

Fill in the target date for each step, based on your time estimates determined in Production Schedule Work Sheet I. Then, as you finish each step for this issue, fill in the actual date for completion. Note any time discrepancies or forgotten steps and revise your next issue's work sheet accordingly.

	Target date	Actual date
Preliminary planning session		
Final planning session		
Story assignments distributed		
Preliminary drafts completed for review		
Drafts approved		
Stories submitted for editing		
Editing and copyfitting completed		
Stories approved		
Copy specked and to typesetter		
Galleys from typesetter		
Galleys proofed		
Photocopy mock-up completed		
Galleys corrected		
Paste-ups completed for printing		
Paste-ups proofed and approved		
Paste-ups to printer		
Blue/silverprint approved		
Printing completed		
Distribution completed		

F. News Gathering and Planning Issues

It is critical to have sufficient copy prepared in advance. Some suggestions are:

1. Develop a network of reliable information sources.
2. Plan in advance themes for issues and stories you want to present.
3. If you need additional information for stories, identify resources and arrange to get it well in advance of deadlines.
4. Keep a supply of back-up material available so you can substitute at the last minute if you need to.

Identify a list of resources:

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

e. ______________________________

f. ______________________________

g. ______________________________

h. ______________________________

i. ______________________________

j. ______________________________

Prepare a complete list of resources with names, addresses an phone numbers. Keep a complete copy in the central file.

Person Responsible: ______________________________

Identify potential themes:

a. ____________________
b. ____________________
c. ____________________
d. ____________________
e. ____________________
f. ____________________
g. ____________________
h. ____________________
i. ____________________
j. ____________________

G. Interviews

Interviews can be an effective way to get information. A good and inexpensive resource for tips on conducting interviews is William Zinsser's book On Writing Well, published by Harper & Row, New York, in 1983.

List potential interviewees:

a. ____________________
b. ____________________
c. ____________________
d. ____________________
e. ____________________
f. ____________________
g. ____________________
h. ____________________
i. ____________________
j. ____________________

Summary

There are many mechanical considerations which you will need to be aware of such as copy editing, proofreading, copysetting, photos and illustrations, design, typesetting, and layouts. Consult with individuals who have the expertise in "Newsletter" production. Some references are provided which you may wish to obtain and study.

References

Maas, J. (1981) Better Brochures, Catalogs and Mailing Pieces. New York, New York: St. Martin's Press.

Newsletters A Guide to Editing, Design and Production. (no date) available from - Promotional Perspectives 450 South Main Street, P.O. Box 7341, Ann Arbor, Michigan 48107, (313) 994-0007.

Resources

Angione, Howard, ed. The Associated Press Stylebook and Libel Manual. Stylebook used by most newspapers. Alphabetical listings covering capitalization, abbreviations, punctuation and photo captions. Published by the Associated Press, New York, 1977. Available in hardcover for $12.95 from your local bookseller.

Beach, Mark. Editing Your Newsletter. Second edition of this course book designed for newsletter editors with entry-level skills in writing, editing, graphics, design, or printing. It helps improve your format and content and reduce costs by answering basic questions about interviewing, reporting, advertising, typesetting, format, design, copyfitting, scaling, proofreading, production, mailing and scheduling. Published by Van Nostrand Reinhold Company, New York, 1983. Available in hardcover for $17.50 from your local bookseller.

Communication Briefings. Informative eight-page monthly newsletter with "ideas that work." Offers tips on writing copy, conducting interviews, using photos and direct mail techniques. Especially interesting are findings of recent studies on publication trends. A one-year subscription is $48. Send check or money order to Communication Briefings, P.O. Box 587, Glassboro, NJ 08028, or phone (609) 589-3503.

Communications Concepts. Inaugurated in 1984, this problem-solving, idea stimulator packs plenty for communication executives in each eight-page issue, distributed monthly. Fast reading in a variety of key areas, including communications management, writing and editing, time and money savers, design and production and new technology. A one-year subscription is $97. Mail check or money order or request billings from Communication Concepts, Subscriber Services, P.O. Box 1608, Springfield, VA 22151-0608.

Craig, James. Designing with Type. A basic course in typography. Includes chapters on basic type measurements, families of type, preparing copy for typesetting. Published by Watson-Guptill Publications, New York, copyright 1971, 1980. Available in hardcover for $15.95 from your local bookseller.

Editorial Eye. A monthly newsletter focusing on publications standards and practices. Subjects discussed include work usage, writing in plain English, points of grammar, book reviews and more. A one year subscription is $44. Send check or money order to The Editorial Eye, Editorial Experts, 4600 Duke St., Alexandria, VA 22304, or phone (703) 823-3223.

Lem, Dean Phillip. Graphics Master 3. The third edition of an invaluable workbook of planning aids, reference guides, and graphic tools for the design, estimating, preparation, and production of printing and print advertising. Send check or money order for $52.50 to PRINT_Book Store, 6400 Goldsboro Rd., Bethesda, MD 20817.

Newsletter on Newsletters. A biweekly newsletter reporting mainly on paid-subscription newsletters. Includes items on newsletters being launched and those either being bought or sold. Regular features on editing, graphics and management. A one-year subscription is $84. Send check or money order to Newsletter on Newsletters, 44. W. Market St., P.O. Box 311 Rhinebeck, NY 12572, or phone (914) 876-2081.

Ragan Report. A biweekly newsletter of ideas and methods for communications executives. Reports on legislative issues, conferences and programs of interest to communicators. Regular supplements on design, typography and industry news. A one-year subscription is $129. Mail check or money order to Lawrence Ragan Communication, Inc., 407 S. Dearborn St., Chicago, IL 60605, or phone (312) 922-8245.

Rush, William L. Write With Dignity. A style booklet to guide reporters in preparing information about people with disabilities. Free copies available by contacting the Hitchock Center, School of Journalism, 206 Avery Hall, Lincoln, NE 68588-0127.

The University of Michigan. Proofreader's Guide. A booklet of guidelines to assist those who have proofreading responsibilities. Filled with definitions, tools, methods, procedures, rules and practical information for the proofreader. Free of charge if you send a self-addressed 6x9 envelope with 39 cents postage paid to Univeristy Publication, 109 East Madison, Ann Arbor, MI 48104.

Zinsser, William. On Writing Well. An informal guide to writing nonfiction. According to Edwin Newman, Zinsser is "an excellent writer and an excellent teacher of writing. He's funny too." Especially useful are the chapters on interviewing, science and technical writing and writing on the job. Second edition published by Harper & Row, New York, 1980. Available in hardcover for $8.95 from your local bookseller.

Excerpted from: Newsletters A Guide to Editing, Design and Production (no date).

TRAINING MODULE IV

SEMINAR / CONFERENCE / WORKSHOP DEVELOPMENT

Introduction

The following guidelines are provided for the state transition team as suggested procedures which can be implemented to assist in the organization and management of a seminar/conference/or workshop. If you determine, through collaboration and consensus, that the needs, goals, and objectives for your state transition training effort can be most effectively and efficiently met through a seminar/conference/workshop approach, then the following module should be of assistance.

The module is structured so you can use it as a source of information, worksheets, and/or checklists. Keep in mind that you can add, delete, and modify them to best meet your state needs and planning process.

A. Advance Planning

1. Schedule an initial planning session:

   Date: ______________________________

   Location: __________________________

   Time: ______________________________

2. Bring to planning meeting (each team member)

   a. Key ideas, concepts, objectives, and questions

      ____

      ____

      ____

   b. Identify specific talents and/or skills you feel will be needed during planning and implementation.

      ____

      ____

      ____

3. Complete the team (if you wish) by inviting resource people (RP) to join you for the purpose of planning, implementing or evaluating the training effort.

   a. Identify potential members

   R.P. 1. ____

   R.P. 2. ____

   R.P. 3. ____

   R.P. 4. ____

R.P. 5. ______________________________

R.P. 6. ______________________________

b. Assign team members to contact resource people (RP)

Determine deadline date for contact. Date: ________

RP 1: Name ______________________________

Affiliation ______________________________

Address ______________________________

____

Phone No. ____________________

Contact Assigned to: ____________________

RP 2: Name ______________________________

Affiliation ______________________________

Address ______________________________

____

Phone No. ____________________

Contact Assigned to: ____________________

RP 3: Name ______________________________

Affiliation ______________________________

Address ______________________________

____

Phone No. ____________________

Contact Assigned to: ____________________

RP 4: Name ________________________________

Affiliation ____________________________

Address ______________________________

____

Phone No. ____________________

Contact Assigned to: ____________________

RP 5: Name ________________________________

Affiliation ____________________________

Address ______________________________

____

Phone No. ____________________

Contact Assigned to: ____________________

RP 6: Name ________________________________

Affiliation ____________________________

Address ______________________________

____

Phone No. ____________________

Contact Assigned to: ____________________

4. List the objectives in Part I of this manual which you have determined to be targeted for training effort.

Objective 1: ______________________________

____

____

Objective 2: ______________________________

____

____

Objective 3: ______________________________

____

____

Objective 4: ______________________________

____

____

Objective 5: ______________________________

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Objective 6: ______________________________

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Objective 7: ______________________________

____

____

Objective 8: ______________________________

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Objective 9: ______________________________

____

____

Objective 10: _____________________________

____

____

Objective 11: _____________________________

____

____

Objective 12: ______________________________

____

____

5. Prioritize through consensus. (Use the same process for prioritizing which you used when you first prioritized your state transition needs at the Leadership Institute). List six major objectives:

Objective 1: ______________________________

____

____

Objective 2: ______________________________

____

____

Objective 3: ______________________________

____

____

Objective 4: ______________________________

____

____

Objective 5: ______________________________

____

____

Objective 6: ______________________________

____

____

6. Group your objectives into manageable clusters:

Topic/Group 1: ____________________

____

____

Topic/Group 2: ____________________

____

____

Topic/Group 3: ____________________

____

____

7. Write a collective seminar/conference/workshop description.

Description: ____________________

____

____

8. Develop the seminar theme and/or title:

Theme: ____________________

Title: ____________________

9. Identify type(s) of participants, e.g., blind/visually impaired students and their parents, employers, educators, rehabilitation workers, or any combination.

Participants: a. ____________________

Participants: b. ____________________

Participants: c. ____________________

Participants: d. ____________________

10. Identify special needs of participants (e.g., braille/ large print programs, and conference materials; baby sitting services, dog runs, hotel accessible for handicapped, etc.).

Special needs:

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

e. ______________________________

f. ______________________________

g. ______________________________

11. List the state transition team's anticipated outcomes.

Anticipated outcomes:

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

e. ______________________________

f. ______________________________

g. ______________________________

12.0 List participants' expectations:

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

e. ______________________________

f. ______________________________

g. ______________________________

12.1 If participants' expectations are not known, determine through a phone survey.

12.2 Design a mini-survey questionnaire which states:

a. the training effort theme

b. the objectives of training effort

c. requests participants to identify anticipated outcomes

12.3 Assign team members to call a sample of anticipated participants to complete the phone survey prior to next planning meeting. Determine Deadline Date: __________

1. Team member ______________________________

Participants to survey:

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

e. ______________________________

f. ______________________________

2. Team member ______________________________

Participants to survey:

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

e. ______________________________

f. ______________________________

3. Team member ______________________________

Participants to survey:

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

e. ______________________________

f. ______________________________

4. Team member ______________________________

Participants to survey:

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

e. ______________________________

f. ______________________________

13. Develop a flow chart to help you conceptualize the sequence and time lines for activities involved in both planning and implementation. Use the space below.

Seminar/Conference Flow Chart

14. Develop a master checklist which can be used to track a series of tasks:

   a. Use it as a communication tool among team members
   b. Keep checklist together in a central file
   c. Send each team member a copy of all checklists

EXAMPLE OF CHECKLIST FORM

To: ____________________ From: ____________________ Date: ________

____________________ ____________________

TASK OR JOB TITLE:

Date	Time	Place	Person(s)	Description of Task

Special Remarks/Instructions: ____________________

Copies to: ____________________

Ref.: Murray, S. L., 1983 *How to organize and manage a seminar*. New Jersey: Prentice Hall, Inc.

15. Up-date state team list with resource persons to include:

Name ____

Affiliation __________________________________

Address ______________________________________

____

Home/Work Phone Numbers_________________________

16. Disseminate updated list to all members.

17. Review findings from phone surveys and use data in future planning.

B. Budget

1. Determine budget resources.
    a. Amount from AFB ____________________
    b. Other sources:
        (1) matching funds ____________________
        (2) registration fees ____________________
2. Determine who on state team is responsible for budget management:

    Budget Manager ____
3. Develop a budget checklist. (Example Provided)

EXAMPLE OF BUDGET CHECKLIST

Item	Cost	Due Date
1. Planning meeting:		
Time away from job		
Location		
2. On-Site inspection:		
Travel expenses		
Lodging		
Time away from job cost		
3. Audiovisual:		
Microphones, etc.		
4. Speakers:		
Speaking fees		
Preparation time charges		
Travel		
Lodging		
Miscellaneous		
5. Food and beverage:		
Continental breakfast		
Morning coffee break		
Lunch		
Afternoon break		
Deposits		
Gratuities		
6. Travel and lodging:		
Staff and/or participant		
Air fare		
Car rentals		
Lodging		
Meals		
Miscellaneous		
7. Facility rooms:		
Overnight		
Seminar		
Luncheon		
Breakout		
Deposits		
Gratuities		

Budget Checklist (continued)

Item	Cost	Due Date
8. Printing:		
Brochures/announcements		
Workbook/handouts		
Braille/large print reproduction		
9. Photographs		
10. Shipping:		
Printed matter		
Equipment		
11. Part-time staff		
12. Miscellaneous:		
Postage		
Telephone		
Secretarial		
13. Baby sitting services		
Nurse		
Playroom rental		
Meals		
Total		

C. Date Selection

Select date(s) for training effort considering the following:

1. Final report due date at AFB

   Due date: July 1, 1987

2. Off-season rates

   Months: ______________________________

   Days: ______________________________

3. Other commitments for participants:

   National meeting dates: ______________________________

   Regional meeting dates: ______________________________

   State meeting dates: ______________________________

   Weather conditions: ______________________________

   Exam week dates: ______________________________

   Graduation week dates: ______________________________

   Busy business week dates: ______________________________

   Other considerations and dates: ______________________________

   ____

   ____

   ____

4. Select best:

   Month ______________________________

   Week(s) ______________________________

   Day(s) ______________________________

5. Select:

   First choice date(s): ______________________________

   Second choice date(s): ______________________________

Date Selection (continued)

6. Final Date(s) Selection:

Scheduled Final Date(s): ______________________________

D. Training Effort Format

1. Review the objectives theme, description and expectations.
2. Determine the Format:
    a. Conference ____________________
    b. Workshop ____________________
    c. Seminar ____________________
    d. Career Day ____________________
    e. Other ____________________
3. Determine Time Frame: ____________________
    a. Day ____________________
    b. Days ____________________
    c. 8:30 AM - 5:00 PM ____________________
    d. 9:00 AM - 4:00 PM ____________________
    e. Other ____________________
4. Determine Topics to be Presented:
    a. ____________________
    b. ____________________
    c. ____________________
    d. ____________________
    e. ____________________
    f. ____________________
5. Determine Style of Speakers' Involvement:
    a. Lecture ____________________
    b. Panel ____________________
    c. Interview ____________________

d. Consultation ______________________________

e. Discussion Leaders ______________________________

f. Other ______________________________

6.. Determine Tentative Agenda

EXAMPLE OF AGENDA

THEME

SPONSORS

DATE

LOCATION

Day, Date

8:30 AM - 9:30 AM	Keynote Presentation Moderator Speaker Affiliation
9:30 AM - 10:15 AM	Concurrent Workshops Workshop 1 Topic(s) Workshop Leader(s) Affiliation Target Audience(s)
	Workshop 2 Topic(s) Workshop Leader(s) Affiliation Target Audience(s)
	Workshop 3 Topic(s) Workshop Leader(s) Affiliation Target Audience(s)
10:15 AM - 10:45 AM	Coffee Break All Participants Socialize Together

10:45 AM - 11:45 AM	Concurrent Workshops Workshop 4 Topic(s) Workshop Leader(s) Affiliation Target Audience(s) Workshop 5 Topic(s) Workshop Leader(s) Affiliation Target Audience(s) Workshop 6 Topic(s) Workshop Leader(s) Affiliation Target Audience(s)
12:00 PM - 1:30 PM	Box Lunch (Working Session)
1:30 PM - 2:30 PM	Concurrent Workshops Workshop 7 Topic(s) Workshop Leader(s) Affiliation Target Audience(s)
2:30 PM - 4:00 PM	Wrap-Up Session Reports from Workshop Leaders
4:00 PM - 5:00 PM	Concluding Remarks State Transition Team
5:30 PM - 6:30 PM	State Transition Team Meeting

E. Select Speakers

1. Review the objectives, theme, conference/seminar/workshop description and anticipated outcomes.

2. List potential topics and speakers, moderators/group leaders, etc., using input from team members, and resource persons. Assign team members to contact first choice after final decision is made. Set deadline date.

   Deadline Date: ______________________________

Topics	Potential Speakers/Moderators/Panelists
a. ____________	(1) ____________________
	(2) ____________________
	(3) ____________________
	To Be Contacted By: ____________
b. ____________	(1) ____________________
	(2) ____________________
	(3) ____________________
	To Be Contacted By: ____________
c. ____________	(1) ____________________
	(2) ____________________
	(3) ____________________
	To Be Contacted By: ____________
d. ____________	(1) ____________________
	(2) ____________________
	(3) ____________________
	To Be Contacted By: ____________

E. Select Speakers (continued)

e. ________ (1) ________

(2) ________

(3) ________

To Be Contacted By: ________

f. ________ (1) ________

(2) ________

(3) ________

To Be Contacted By: ________

g. ________ (1) ________

(2) ________

(3) ________

To Be Contacted By: ________

h. ________ (1) ________

(2) ________

(3) ________

To Be Contacted By: ________

3. List potential introducers. Assign team member to contact after first choices are determined. Set deadline.

Deadline Date: ________

Topics	Potential Introducers
a. ________	(1) ________
	(2) ________

E. Select Speakers (continued)

b. ____________________ (1) ______________

(2) ______________

c. ____________________ (1) ______________

(2) ______________

d. ____________________ (1) ______________

(2) ______________

e. ____________________ (1) ______________

(2) ______________

f. ____________________ (1) ______________

(2) ______________

g. ____________________ (1) ______________

(2) ______________

h. ____________________ (1) ______________

(2) ______________

All introducers to be contacted by: ______________

4. For each potential speaker, ask yourselves:

   a. Do they know the subject matter?

   b. What, if anything, will they charge?

   c. Can they present material in the time frame you will structure?

   d. Can the speaker present the material in an interesting and dynamic manner?

5. For each potential group leader/moderator ask yourselves:

   a. Do they know the subject matter?

   b. Can they manage a group?

E. Select Speakers (continued)

c. Can they synthesize and present summary statements?

6. Using checklist, contact first choice for speakers.

a. Inform speakers of:

(1) Purpose and theme of training effort:

____

(2) Topic: ______________________________

(3) Format: ______________________________

(4) If panelists, inform them of others serving on panel:
1. ________________________
2. ________________________
3. ________________________

(5) Date: ______________________________

(6) Length of presentation: ____________________

(7) Location: ______________________________

(8) Anticipated types of participants: ________

____

(9) Anticipated number of participants: ______

(10) Sensitize speaker to needs of blind/visually impaired participants regarding audiovisual aids: ______________________

7. Ask them if they:

(1) Charge a fee, if so the amount is: ____________

(2) Will be providing handouts: Type ____________

Length ___________

E. Select Speakers (continued)

(3) Have any audiovisual needs: List

____

____

____

(4) Require a contract, if so will they provide?

____

(5) Require advance payment: ______________

8. Follow through phone commitments with a formal letter of agreement including all specifics. Use the same letter for all speakers changing only the specifics. Retain copies for files. The basic elements to include in the letter are:

a. Your state transition team contact person:

Name: ______________

Address: ______________

Phone numbers: ______________

b. Speaker information:

Name: ______________

Affiliation: ______________

Address: ______________

Phone numbers: ______________

c. Training activity information:

Location: ______________

Address: ______________

Phone number: ______________

E. Select Speakers (continued)

Theme: ____________________

Description: ____________________

Specify facility room assigned to: ____________________

Tentative agenda: ____________________

Expected number of participants: ____________________

Types of participants: ____________________

____

Presentation style: ____________________

Room setup style: ____________________

d. Speaker specifics:

Audiovisual needs: ____________________

Handouts: ____________________

Request handouts a month in advance so they can be prepared in appropriate media: ____________________

____

Others (specify): ____________________

e. Expense schedule:

Who pays expenses: ____________________

Which expenses are covered: ____________________

Air/ground transportation: ____________________

Overnight accommodations: ____________________

Food: ____________________

Miscellaneous: ____________________

f. Travel arrangements:

Who will make:

air arrangements ________________________________

ground arrangements ______________________________

time of departures _______________________________

time of arrivals ________________________________

How is speaker to travel to and from training site?

Limo, car, etc. _________________________________

g. Invoice information:

Does speaker bill: ______________________________

When is payment scheduled: ______________________

h. Overnight arrangement:

Who pays: ______________________________________

Who makes reservations. _________________________

The dates needed: _______________________________

Contact person upon arrival:

Name: ____

Address: ______________________________________

Home and business phones: ______________________

i. Recording arrangements:

Permission: _____________________________________

Mode: ____

Plans for dissemination: ________________________

j. Signatures and dates:

Speaker signs and returns copy to contact person: ____

9. File signed letters of agreement: ______________________

10. Be prepared for cancellations:

E. Select Speaker (continued)

- a. Have list of second and third choices ready.
    - (1) Include full name, address, and phone numbers.
    - (2) Keep this resource list in central file.

F. Audiovisual (AV) Needs

1. Consider your probable AV needs prior to determining your training site, as you need to be able to determine the site's ability to accommodate your needs within your budget.
2. Use a checklist to determine AV needs, schedule, and costs. An example is provided.
3. If a site is selected which does not have rental equipment add a column to the checklist to determine who will be responsible for:
    a. Procuring needed equipment: ____________________
    b. Transporting it to training site: ______________
    c. Setting-up equipment: ________________________
    d. Taking-down equipment: _______________________
    e. Returning equipment: _________________________
4. Provide site with complete schedule of AV needs including: (Most commercial sites will provide forms to be completed.)
    a. Specific equipment needed
    b. Specific times
    c. Specific room locations
    d. Operator

EXAMPLE OF AUDIOVISUAL CHECKLIST

Equipment	#Needed	Time Needed	Availability	Cost
Cassette Recorder				
Reel to Reel				
House System Plug-in				
Public Address System				
Fixed Lectern Microphone				
Hand-held Microphone				
Lavaliere Microphone				
Clip-on Microphone				
Film Strip Equipment				
Overhead Projectors				
Movie Projectors				
Opaque Projectors				
Video Equipment				
Screens				
Lecterns				
Easels				
Pads				
Bold Magic Markers				
Bulletin Boards				
Chalkboards				
Pointers				
Slide Projectors				
Remote Advance/ Focus				
Replacement Bulbs				

G. Training Activity Room Setup Styles

The room setup style(s) you select will depend on the types of sessions you plan to have. You may select a variety of setups.

1. The seven most common setup styles are:
   - a. Amphitheater
   - b. Classroom
   - c. Banquet
   - d. Theatre
   - e. U shapes
   - f. Chairs only
   - g. Floor/ground sitting
2. Use the pros/cons to determine the setup arrangement for each session. [Most commercial sites will have forms to complete as to the setup you require.]

   You will need to identify:
   - a. Setup choice
   - b. Times
   - c. Room size
   - d. Number of participants and required seating for each session
3. Some pros/cons of the seven most common setup styles are presented in the following chart.

ADVANTAGES OF SEVEN SETUP STYLES

	amphitheater	classroom	banquet	theater	Ushape	chairs only	floor/ ground sitting
Clear view of speakers	x	x	x		x	x	
Clearly defined capacity	x			x			
Acoustics generally good	x			x			
No writing surface	x			x		x	x
Evokes classroom responses	x	x		x			
Fixed seating	x			x			
Large enough for big groups	x			x	x	x	x
Most locations can set up		x	x	x	x	x	x
Set up is quick	x	x		x	x	x	x
Writing surface		x	x		x		
Accommodates small groups		x	x		x	x	x
Promotes small group discussion		x	x		x	x	x
Provides privacy for small group		x	x		x	x	x
Promotes less structural responses			x		x	x	x
Encourages participation			x		x	x	x
Facilitates small groups			x		x	x	x

H. Training Activity Site Selection

1. Location of training site should be carefully selected. Options include: (check those you want to consider)
    - a. Conference Centers __________
    - b. Hotels/Motels __________
    - c. Resort Areas __________
    - d. Universities/Colleges/Schools __________
    - e. Clubs, Town Halls, Churches, Community Centers _____
    - f. Service Organization Meeting Rooms __________
    - g. Library Meeting Rooms __________
    - h. Government Buildings __________
    - i. Corporate Headquarter Buildings __________
    - j. Others: List ______________________________________

      ____
2. Consider geographic location possibilities based on:
    - a. Geographic distribution of participants
    - b. Ease of access to site via air and ground travel
    - c. Ease of access to possible resources
    - d. Appeal
3. Facility selection considerations should include:
    - a. Accessibility of entrances, exits, elevators, stairs, ramps, escalators, rest rooms, etc.
    - b. Availability of accommodations :
        1. Reasonable
        2. Clean
        3. Accessible
        4. Safe

c. food and refreshment capabilities both on and off-site:
   1. Quality
   2. Reasonable charges
   3. Special dietary accommodations
   4. Cleanliness
   5. Willing to provide what you want, e.g., box lunches rather than sitdown hot lunch

d. Meeting room(s):
   1. Size adequate to accommodate general session
   2. Sufficient number of breakout rooms for concurrent sessions
   3. Informal conversation areas
   4. Smoking/non-smoking regulations
   5. Registration area
   6. General ambiance
   7. Lighting
   8. Audiovisual needs
   9. Risers/stages

I. Mailing List Preparation

1. Identify all mailing list resources, note if there is a charge, assign team members to procure and due dates.

MAILING LIST FORM

Resources	Charge	Team Members Assigned	Due Date
1.	$		
2.	$		
3.	$		
4.	$		
5.	$		
6.	$		
7.	$		
8.	$		
9.	$		
10.	$		

2. Determine deadline for mailing of letters of invitation/ tentative agendae.

Due Date: ______________________________

3. Prepare mailing lists and envelopes.

Team members assigned: ______________________________

____

J. Letter of Invitation/Announcement and Tentative Agenda

1. Prepare letter of invitation/announcement of training event. Include:
    - a. Letter
        1. Theme: ______________________
        2. Description: ______________________
        3. Registration fee: ______________________
        4. What registration fee includes (i.e., meals): ______________________
        5. Date(s): ______________________
        6. Location: ______________________
        7. Anticipated outcomes: ______________________
        8. Sponsors: ______________________
    - b. Prepare/include tentative agenda (See agenda example previously presented).
    - c. Prepare/include registration form. Request that participants complete it as they want it listed on participants list.
        1. Name of Training Event: ______________________
        2. Location: ______________________
        3. Date: ______________________
        4. Sponsors: ______________________
        5. Name: ______________________
        6. Affiliation: ______________________
        7. Address: ______________________
        8. Phone Number: ______________________
        9. Due Date for Return: ______________________

J. Letter of Invitation/Announcement and Tentative Agenda (continued)

10. Identifiers
    a. adult role model ____________________
    b. employer ____________________
    c. parent ____________________
    d. rehabilitation worker ____________________
    e. teacher ____________________
    f. student ____________________
11. Materials
    Request Materials in Braille ____________
    Request Materials in Large Print ____________
    Request Materials in Audio-Tape ____________
12. Deadline
13. Fee - pre-registration ____________________
    on-site ____________________

d. Provide return envelope
    1. Self-addressed ____________________
    2. Postage Paid ____________________
e. Mail letters of invitation/announcement, tentative agenda, registration forms, and return envelopes.
f. Assign team members responsible for mailings:

____

____

K. Registration

1. Prepare registration list as registrations are returned, indicate if they have paid the registration fee.
2. Prepare name tage for participants, speakers, moderators.
3. Prepare registration desk kit using the following checklist. (Example is provided on following page.)
4. Set up schedule and make assignments to the registration area.

Registration Area Assignments

Name	Date	Time

Registration Desk Kit
Registration Area Supplies

Item	Procured	Packed	Shipped	Returned
Scissors				
Packing knife				
Masking tape				
Cellophane tape				
Paper clips (large & small)				
Stapler				
Staples				
Handi-wipes				
Pencils				
Pens				
Magic markers				
Safety pins				
First aid kit				
Mailing labels				
Extra name tags				
Cash box & change				
Extension cords				
Phone message pads				
Writing pads				
String or twine				

Registration Desk Kit (continued)

Item	Procured	Packed	Shipped	Returned
Participant lists				
Pre-prepared name tags				
Pre-assembled training session kits for pre-registrants				
Extra pre-assembled training session kits for on site registrants				
Hand-outs in print, large print and braille				

L. Food and Refreshments

1. Determine which meal functions and refreshment breaks you will provide:

Day One

a. Day ____________________

b. Date ____________________

c. Breakfast (type) ____________________

d. Luncheon (type) ____________________

e. Dinner ____________________

f. AM Coffee Break ____________________

g. PM Coffee Break ____________________

h. Reception ____________________

Day Two

a. Day ____________________

b. Date ____________________

c. Breakfast (type) ____________________

d. Luncheon (type) ____________________

e. Dinner ____________________

f. AM Coffee Break ____________________

g. PM Coffee Break ____________________

h. Reception ____________________

2. If catering services are available they will provide proposed menus, charges, etc. Be prepared to give them tentative totals of anticipated participants.

3. One team member should be assigned to work directly with caterers.

Team member ____________________

L. Food and Refreshments (continued)

4. If catering services are not available, but some refreshments are to be provided, select a committee to be responsible.

Refreshment Committee:

Chairperson ______________________________

Committee members _________________________

____

____

5. Determine budget for food and refreshments.

6. Select food and refreshments within budget.

M. Communication/Publicity Time Frame

1. Begin advanced communications/publicity as soon as you have the following information:
    a. Theme
    b. Description
    c. Date(s)
    d. Location
    e. Time
    f. Facility
    g. Travel information
    h. Registration fee
2. Some suggested communication/publicity options include:
    a. Special Net __________
    b. Rehab Net __________
    c. Newsletters __________
    d. Flyers (Mail) __________
    e. Radio Reading Service __________
    f. Local Radio Program __________
    g. Community Bulletin Boards __________
    h. Announcements at other relevant meetings __________

N. Evaluation

1. A training effort is not complete without an evaluation, analysis, and debriefing.

2. Three types of evaluation to consider are:

   a. Evaluation by the participants

   b. Evaluation by the state transition team

   c. Evaluation by outside observer/consultant

3. Five levels of evaluation to incorporate into your evaluation process are:

   a. Are the participants satisfied with the training effort?

   b. Did the presenters teach the concepts/meet selected objectives?

   c. Did the training effort teach/provide experiences which exemplified the concepts identified in the selected objectives?

   d. Were the concepts presented applicable to the needs of the participants?

   e. Will the application of the concepts presented positively affect the transition of blind/visually impaired youth?

4. Based on these five levels of evaluation consider:

   a. What might be measured

   b. Measurement dimensions

   c. Sources of data

   d. Alternative data gathering methods

5. Points 2 through 4 may be considered in relationship to each other by using the following matrix.

Evaluation Matrix

What We Want To Know	What Might Be Measured	Measurement Dimensions	Sources Data	Alternative Data Gathering Methods
.Are participants satisfied? Why?	.Participant reaction during training .Participant reaction after training	.Relevance .Ease of Learning .Supportive .Threatening	.Comments among participants .Comments to presenters .Questions asked .Involvement during discussions/ workshops	.Observation .Interviews .Questionnaire .Pre/Post Test
.Did the presenters teach the concepts/meet objectives? Why? .Presentations .Examples .Exercises .Materials used	.Participant performance during training .Speaker organization, clarity, relevance .Participant performance at end of training .Effectiveness of materials .Effectiveness of presentation structure	.Understanding .Application .Relevance .Organization .Articulation	.Learning time .Performance during exercises .Presentations	.Observation .Material Review .Questionnaire .Pre/Post Test .Interview .Document review

What We Want To Know	What Might Be Measured	Measurement Dimensions	Sources Data	Alternative Data Gathering Methods
.Did training effort teach/ provide concepts identified in selected objectives? Why? .Concepts not relevant, too complex, too sophisticated, on-target, applicable	.Participant performance during training .Participant performance at end of training .Problem solving strategies presented .Applications clearly stated/ exemplified .Tools provided for on-going efforts	.Relevance .Understanding .Application .Analysis .Action Plans .Results .Dissemination effort .Language	.Discussion .Documentation .Results .Meetings .Action plan .Presentations .Performance during exercise .Questions asked .Statements made	.Observation .Document review .Interview .Questionnaire

What We Want To Know	What Might Be Measured	Measurement Dimensions	Sources Data	Alternative Data Gathering Methods
.Were concepts presented applicable to needs of participants?	.Participants reaction during training .Participants reactions after training .Participants performance .Problem solving .Transference .Application	.Relevance .Ease of learning .Understanding .Application .Analysis .Action plan results .Questions asked .Action proposed action taken .Problem identification	.Comments among participants .Comments to presenters .Comments to state transition team .Questions .Performance .Action plans .Discussions .Documentation .Results	.Observation .Interview .Questionnaire .Document review

What We Want To Know	What Might Be Measured	Measurement Dimensions	Sources Data	Alternative Data Gathering Methods
.Will application of concepts presented positively affect the transition of blind/VI youth?	.Problem solving .Problem prediction .Problem prevention .Transference .Application .Action plan developed	.Problem identification .Analysis .Action .Results .Output	.Discussions .Documentation .Results .Performance .Data	.Interview .Document Review .Questionnaire .Observation

6. An example of an observation checklist is provided

EXAMPLE OF OBSERVATION CHECKLIST

Name of Training Effort
Sponsoring Organizations

Date
Location

Session: ______________________________

Time: ______ Date: ______ Presenter: __________

A. Training Objectives For This Session Were:

1. ______________________________
____

2. ______________________________
____

3. ______________________________
____

B. Assessment: To what extent did the objectives appear to be attained?

1. Fully

2. Partially

3. Hardly at all

C. Checks on Attainment: What steps did the presenter/ discussion leader take to assure that objectives were being attained? ______________________________

____

EXAMPLE OF OBSERVATION CHECKLIST (continued)

Factors Influencing Objective Attainment:

Factor	Check
A. Introduction to training effort	____
B. Content	____
C. Clarity	____
D. Presenter's knowledge of subject	____
E. Organization	____
F. Use of training aids	____
G. Presenter's manner	____
H. Presenter's ability to maintain interest	____
I. Presenter's ability to direct discussion	____
J. Appropriateness of material	____
K. Time/material relationship	____
L. Participants' involvement	____
M. Instructional methods used	____
N. Reference materials	____
O. Facilities	____
P. Exercises	____

Q. Other, Please specify ______________________________

____

____

O. Follow-Up and Debriefing

1. Prior to training effort:
    a. Assign team member to collect and tally evaluation results ______________________________
    b. Set date for tallied results to be sent to all team members ______________________________
    c. Set date for debriefing (date should be following receipt of tallied evaluations) ____________________
    d. Set date for future planning meeting _______________

2. Make final payments to facilities, speakers, and suppliers.

    Team member responsible: __________________________________

3. Draft and send thank you letters to planners, implementers, speakers, moderators, etc.
    a. Team member assigned: ______________________________________
    b. Date for mailing thank you's: _____________________________

4. Debriefing meeting agenda
    a. Team chairperson should provide a flexible written agenda for all those attending debriefing meeting.
    b. Team chairperson should begin with an opening brief statement of summation.
    c. Team member responsible for tallying evaluation data should present a brief summation.
    d. Team discuss/review evaluations

O. Follow-Up and Debriefing (continued)

    1. List key elements

e. Team discuss/review observations

    1. List key elements

f. Discuss implications of training effort evaluations and

    1. Future planning
    2. Follow-up actions
    3. Effects on transition of blind/visually impaired youth
    4. Prepare minutes of meeting and file in central file

    Person responsible: ______________________________

O. Follow-Up/Debriefing (continued)

5. Schedule next team meeting

6. Make assignments for final report preparation for your own files and submisssion to AFB

7. An example of an evaluation form is provided

EXAMPLE EVALUATION FORM

Name of Training Effort
Sponsoring Organizations

Date
Location

1. Identify your role
   - Adult Role Model ____
   - Parent ____
   - Educator ____
   - Rehabilitation Worker ____
   - Employer ____
   - Other (specify) ________ ____

2. Overall, I consider this workshop:
   - ___ Very helpful
   - ___ Quite helpful
   - ___ Unsure
   - ___ Somewhat helpful
   - ___ Not helpful
   - ___ Other, Please state ____________________

3. State briefly what was **MOST** helpful to you about this workshop.

4. State briefly what was LEAST helpful to you about this workshop.

5. What issues/concerns/information ... would you like to have included in future transition training efforts?

6. How will you use this information presented to positively affect the transition of blind/visually impaired youth?

Workshop Arrangements

Please note the following aspects of the arrangements for this workshop and include any suggestions for future transition training efforts.

1. Program organization (i.e., sequence of presentations, time alloted, breaks, general vs. small group sessions, luncheon, etc.):

Poor ____ ____ ____ ____ Outstanding

Comments:

2. Materials provided were:

Not Useful ____ ____ ____ ____ Useful

Comments:

3. Location (i.e., proximity to transportation, restaurants, and other activities, etc.):

Poor ____ ____ ____ ____ Outstanding

Comments:

4. Accommodations (i.e., accessibility, hospitality, meeting and sleeping facilities, etc.):

Poor ____ ____ ____ ____ Outstanding

Comments:

5. Planning (i.e., adequacy of notice and tentative agenda, preregistration, etc.):

Poor ____ ____ ____ ____ Outstanding

Comments:

Other comments:

Thank you!

References

Hart L.B. and Schleicher, J.G, (1979) A conference and workshop planner's manual. New York: Amacoma Division of American Management Associates.

Murray, S.L. (1983) How to organize and manage a seminar. New Jersey: Prentice Hall.

Resources

1. Meeting Planners International (MPI)

Address: 3719 Roosevelt Boulevard
Middletown, Ohio 45042
Attention: Manager of Education
Telephone: (513) 424-6827
Service: They publish a resource book which lists all books and articles published on the subject of meeting planning, updated annually. Also publisher of *Directory of Supplier Members and Planner Members*.

2. International Association of Convention and Vistors' Bureaus (IACUB)

Address: 702 Bloomington Road
Champaign, Illinois 51820
Telephone: (217) 359-8881
Service: They produce a general information and membership directory, comprising over one-hundred member bureaus worldwide.

3. Johnson's World-Wide Chambers of Commerce Directory

Address: Johnson Publishers, Inc.
P.O. Box 455
Eighth Street and Van Buren
Loveland, Colorado 80537
Telephone: (303) 667-0652
Service: This is a directory of chambers of commerce worldwide. If you call directly to the publisher, they can provide this directory for you. The U.S. Public Library carries this book, catalogued in the Dewey decimal system as follows:

REF-381
w893

This directory is updated in July of each year.

4. Hotel Sales Management Association International (HSMA)

Address: Publication Office
333 North Gladstone Avenue
Margate, New Jersey 08402
Telephone: (609) 823-1979
Service: They publish the offical hotel and motel directory and facilities guide, a basic

guide for the user of hotel and motel facilities. It is published annually and provides comprehensive information about hotels and motels all over the world.

5. American Society of Training and Development(ASTD)

Address: 600 Maryland Avenue, S.W.
Washington, D.C. 20024
Telephone: (202) 484-2390
Service: This society publishes a cross-reference of information in the field of training and development, called the *Buyers' Guide*. This contains helpful information for any number of concerns connected with seminar planning and implementation. You can obtain a copy by contacting the office.

6. American Society of Travel Agents (ASTA)

Address: 711 Fifth Avenue
New York, New York 10022
Attention: Vice-President, Member Services
Telephone: (212) 486-0700
Service: This society will provide a membership roster to assist you in selection of an agent in any city or region.

7. "Successful Meetings" Magazine

Address: Circulation Department
633 Third Avenue
New York, New York 10017
Service: This is a monthly magazine that includes two special annual directories as a part of the subscription; they are also available for purchase separately: *International Convention Facilities Directory and Sites '81* (annual update)--*A Directory of Cities and Areas for Meetings and Trade Shows.* The *International* directory provides information on specific hotels and their facilities. The *Sites* directory gives detailed information and background on various cities. The combination of these two directories gives an overall picture of an area and the facilities available to you.

8. Your Local Library

Service: Your local library contains a wealth of information on all aspects of seminar planning and implementation.

9. Suppliers in the Specific Location of Your Seminar

Service: In most major cities you can go to the main office of the telephone company and use the directories they keep on hand, which cover the entire United States. Suppliers include:

- Audiovisual companies
- Catering services
- Equipment rentals
- Moving companies
- Car rental agencies
- Local airlines sales managers
- Part-time employment services

Your specific seminar needs determine the suppliers you will require.